

Unit4 delivers agile and accurate financial planning to Canadian city



City of Port Moody



Municipal budget planning has been transformed at the City of Port Moody. By standardizing on Unit4 Financial Planning and Analysis (FP&A) this thriving Canadian municipality benefits from automated financial planning, management, and forecasting.

Interactive and intuitive dashboards enable teams to quickly and effectively manage operating budget, personnel planning, and capital budget.

Key benefits include:

- Budgets aligned instantly, compared with two weeks previously
- Department managers and finance staff save up to 18% of time using online budgeting
- Budgets are now analyzed monthly, compared with annually before
- City staff can deliver improved operational efficiency, service quality, and affordability

Managing a vibrant waterfront city

Port Moody – “City of the Arts” – is home to more than 34,000 residents. Located 40 minutes from Vancouver, this vibrant waterfront municipality values innovative digital solutions that ensure accuracy and increased efficiency.

The City is a satisfied, long-time Unit4 customer, having deployed a comprehensive Enterprise Resource Planning (ERP) platform almost 20 years ago. A connected suite of Unit4 HR, finance, and payroll applications provides a single, intelligent view of back-office operations, enabling the City to be more adaptive, efficient, and in tune with citizens’ needs.

Now the City is moving to its next phase of development. Municipal budget planning was hampered by a reliance on complicated manual spreadsheets. According to Tyson Ganske, Finance Planning Manager, the process needed modernization. “I’m an accountant, so I love spreadsheets,” he says. “However, ours were impossibly complex. They were prone to calculation or formula errors. There were consolidation challenges and they demanded manual intervention. Most importantly, it was difficult to create a complete, unified picture of our municipal budget planning.”

Industry

Local Government

Location

Port Moody, BC, CA

Size

34,000 citizens

Product

Unit4 Enterprise Resource Planning (ERP); Unit4 Financial Planning and Analysis (FP&A)

Challenges

A satisfied Unit4 ERP customer, the City was relying on manual, fragmented, and complex spreadsheets to manage financial planning and analysis. This slow process delayed decisions and inhibited accurate, agile financial planning.

Key metrics

100%

Complete budget alignment immediately, compared with 2 weeks before



Budget review monthly now, compared to annually previously

“The value of Unit4 FP&A is straightforward: It’s about speed and immediacy. People see the financial insights faster. We can draft the budgets collaboratively and quickly. We are all on the same page.”

Tyson Ganske

Finance Planning Manager, City of Port Moody

Following a review of alternative solutions, Tyson and his team chose Unit4. “With Unit4, we can pull data straight out of the ERP system, it’s easy to customize around our business processes, and we have the flexibility to expand FP&A as we progress,” he says. The Unit4 solution was designed and customized by municipal finance professionals specifically for use in a municipal setting.

Seamless, simple, complete planning

The deployment is part of the City’s corporate performance management strategy. Its goal is to monitor and manage performance, according to key indicators, like revenue, return on investment, overhead, and operational costs. FP&A is transforming the City’s approach to budget planning.

- **Single, unified view of budget data** from personnel planning and operating budgets to the capital budget available for expenditure.
- **Seamless and simple:** All data is gathered in one shared, trusted system available to everyone, anytime. Automated workflow eliminates manual data consolidation.
- **Detailed analysis:** A rich, granular view of accounts and cost centers enables teams to quickly and easily understand budgets and plan effectively for the future.
- **Needs and budget aligned:** With a real-time view into available resources, managers can prepare budget requests in line with available resources.

Tyson explains, “A manager can see, for example, that they have spent 60% of their budget, right down to individual cost line items and expenses. They can look at the labor by employee, by team or function. Armed with these insights, they can better plan how to allocate the balance of the budget, ensuring they don’t overspend.”

The City can also more effectively manage its fleet of vehicles. Tyson again: “In the past, it was difficult to understand basic facts from the spreadsheets, such as the annual running costs of each vehicle and depreciation. Now, we can see a 25-year timeline for the assets. This complete view ensures the reserve budget for vehicles doesn’t dip below what is agreed.”

Empowering the people

This intelligent FP&A solution is helping the City understand the financial budget plan more deeply and then turn that insight into action. Moreover, people are more empowered, with increased participation and alignment in planning throughout the organization.

- **100% budget alignment:** Whereas before it took up to two weeks to calculate the alignment of budget with reserves, 100% alignment can now be calculated instantly.
- **18% time savings:** City managers and finance staff save time as a result of integrated online budgeting.
- **Service quality:** Improved financial planning helps deliver

improved operational efficiency, service quality, and affordability.

- **Increased agility:** Planning process automation and interactive dashboards enable the City to now budget monthly, compared with annually using spreadsheets.
- **Granular insights improve budget control** to maintain a real-time view of spend versus actuals and ensure more rigorous cost/budget alignment.
- **Shared intelligence:** People share the same, common view of data for faster, better-informed decision making.

Tyson concludes: “The value of Unit4 FP&A is straightforward: It’s about speed and immediacy. People see the financial insights faster. We can draft the budgets collaboratively and quickly. We are all on the same page.”

