IT BEST PRACTICES for Financial Managers

With the tremendous amount of change in the systems world over the last several years, it is incredibly challenging to stay abreast of the latest system trends and best practices for finance. A comprehensive guide CFOs and controllers will rely on to radically improve organizational productivity, increase revenue, and decrease spending, IT Best Practices for Financial Managers defines clear action plans for the specific phases of IT implementation, including scoping, planning, designing, building, testing, and deploying, and looks at the roles and responsibilities of the CFO to enhance security, controls, and privacy.

IT Best Practices for Financial Managers highlights one of the most important aspects of the CFO’s job—ensuring that financially related systems are implemented on time and on budget, with secure and reliable systems. Its practical coverage offers timely discussion of:

• IFRS and its relevance to the CFO
• The IT technology planning process
• ERP software selection
• The software implementation process
• Critical success factors for IT implementations
• Steering clear of "people pitfalls"
• Shared services and financial systems
• Globalization trends in offshore IT
• The impact of Sarbanes-Oxley on financial systems implementations
• The phenomenon of software as a service
• eCommerce
• Mergers, acquisitions, divestitures, and IT

The only constant about information technology is it is constantly changing. IT Best Practices for Financial Managers focuses on providing financial executives with an understanding of some of the most important system-related areas that can impact the finance function. Filled with best practices for selecting, implementing, and maintaining systems, this practical, thoughtful guide helps financial executives in every field to add value to their organizations via the IT function.

JANICE ROEHL-ANDERSON is the Principal in Charge of Deloitte’s Enterprise Applications practice in the Northern Pacific Region. As such, she is responsible for facilitating the delivery of all ERP-related services. Jan has managed the implementation of numerous enterprise resource planning, customer relationship management, and human resource management software packages, including ones from Oracle, PeopleSoft, SAP, and Siebel. She has over twenty years of global systems-related experience in a variety of sectors including consumer business, media and entertainment, communications, high-tech manufacturing, state and local government, and financial institutions. She has coauthored over ten books for John Wiley & Sons and has successfully completed the CPA Exam.


Praise for IT BEST PRACTICES for Financial Managers

"The work of the financial manager revolves around a company’s financial systems. Ms. Roehl-Anderson’s latest offering addresses the two key aspects of these systems—how to buy and install them. The book covers every conceivable aspect of these systems, including ERP, software as a service, shared services, and supporting controls. As a bonus, the book contains substantial coverage of information technology considerations in an acquisition. This is a definitive desk reference.”

—Steve Bragg, CFO, XeDAR Corporation, and author of Accounting Best Practices

"Sage advice from one of the most adept project managers in the industry! Jan and team have delivered a practical, yet comprehensive guidebook for software selection, implementation, rollout, and ongoing updates. This guidebook will become a valuable reference for every financial manager and IT project manager undertaking ERP implementations.”

—Valerie Borthwick, former senior vice president, Oracle Consulting

"Written by one of the best in the IT business, this book is a must-read for all CFOs and controllers. In one volume, it addresses everything a financial executive needs to know about IT and its impact on the financial function, while also featuring practical guidelines, current hot topics, and IT best practices. This book covers it all.”

—Je Marie Davis, Regional Managing Partner, Ernst & Young

"Financial executives need to understand how IT is applied to their industries. This book is an essential tool for financial managers as it covers every aspect of IT implementation, from selection to deployment, and beyond.”

—Jo Marie Dancik, Regional Managing Partner (Retired), Ernst & Young

(continued from back flap)
IT Best Practices for
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IT Best Practices for Financial Managers

JANICE ROEHL-ANDERSON
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One of the most important aspects of a financial executive’s job is helping to ensure that financially related systems are implemented on time and on budget and that the systems are secure and reliable. Additionally, the financial executive needs to be aware of other key system-related topics, including the systems planning and software selection processes, ways to effectively implement systems using a well-established methodology, ways shared service centers can enhance the investments in systems, the impact of International Financial Reporting Standards (IFRS) on systems projects, trends related to e-commerce and software as a service (SaaS), and the impact mergers, acquisitions, and divestitures can have on the finance area.

There has been a tremendous amount of change in the systems world over the past several years. As a result, it is very hard to stay abreast of the latest system trends and best practices\(^1\) for finance. This book is focused on providing the financial executive with an understanding of some of the most important system-related areas that can impact the finance function. It also contains best practices for selecting, implementing, and maintaining systems.

\(^1\)The term *best practices* represents the authors’ collective experience of what works in the real world and the hundreds of years of their combined time facilitating the successful delivery of information systems projects.
The book is divided into three parts:

- **Part I: The Basics (Chapters 1 through 6).** Many organizations fail to effectively implement and manage their financial systems. This part includes a detailed discussion of the strategic systems planning and software selection process and the best practices associated with them. It also contains a detailed overview of an approach to successfully implementing financial systems, ways to address the “people aspects” of implementations, and an overview of key financial applications. Part I concludes with a detailed overview of shared services and best practices associated with them, some of the trends related to outsourcing that financial executives need to understand, and the next wave for financial systems.

- **Part II: IT Hot Topics (Chapters 7 through 14).** Since the passage of the Sarbanes-Oxley Act, the importance of strong security and controls has risen dramatically. Part II discusses some of the best practices associated with automated security and controls and provides an overview of system privacy and why the financial executive needs to be aware of this aspect of system implementations. This part of the text also contains a detailed discussion of IFRS, one of the hottest topics in the financial and systems world. International Financial Reporting Standards are a single set of accounting principles that are rapidly gaining acceptance by the financial reporting bodies of countries around the world, including the United States. IFRS is focused on the objectives of transparency, reduced complexity, and market-versus-accrual valuation. Part II describes the impact of IFRS on financial organizations and contains a best practices-based approach to implementing IFRS-based systems.

The only thing constant about information technology is that it is constantly changing. This part of the book also
discusses some of the latest trends and related best practices that are impacting the marketplace and financial organizations, including software as a service (SaaS), e-commerce and the impact it is having on financial systems, and the importance of managing product information.

- **Part III: Mergers, Acquisitions, Divestitures, and IT (Chapters 15 through 21).** Over the past several years, a significant number of companies have been involved in mergers, acquisitions, and/or divestitures (MA&D). As a result, it is imperative for financial executives to understand the systems-related aspects of these deals, whether they are the buyer or the seller. This part of the book contains overviews of and best practices related to the following aspects of these deals: key questions financial executives should ask during a deal, ways to conduct IT due diligence prior to closing a deal, methods for capturing IT-related synergies and reducing IT costs, ways an MA&D event can be used to build value, approaches to managing the IT function during a deal, and ways of facilitating data integrity during a deal.

This book is designed to be a practical guide to IT for the financial executive. It is written in nontechnical terms and is focused on helping you add value to your organization via the IT function. In short, it is a guide to IT best practices for the financial executive.
Information technology is constantly changing. Therefore, it was essential for the material in this book to be timely, accurate, and relevant. Accordingly, I selected contributing authors known for their expertise and hands-on knowledge of information technology and how it impacts the finance function. Listed below, in alphabetical order, are these authors. They all have done a superb job of developing a book that is practical and informative.

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- Colleen Chan
- David Deckter
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