







AT A GLANCE

Town of Walden, CO

-  Customer Since 2017
-  Population: 1,400
-  Payroll Employees: 7
-  Caselle Licensed Users: 4
-  Operating Budget: \$4,300,000
-  Metered Services: 3

Challenges

The Town of Walden needed a more robust software to fit their accounting needs, streamline processes and to receive better support. Nervous about implementation and transitioning, Walden spoke to many other communities to review software.

Results

Walden conducted business as usual throughout the implementation process. The Caselle project plan and ongoing communication made implementation much simpler than imagined.

Benefits

- Realistic expectations set from beginning.
- Excellent communication throughout.
- Potential challenges identified early.
- Work with collaborative Caselle team.
- Mock setup for testing and practice.
- Decreased time for daily tasks by 50%.

"Caselle has been refreshing. When I have a question, I always get a timely response."

- Sherry Cure
Town Clerk



Case Study | Walden, CO

The Town of Walden, CO Implements Caselle Software with Ease.



THE JOURNEY

After 15 years of using the same accounting software, the town of Walden needed a more robust platform that would support their accounting activities and streamline their workflows. The legacy system did not allow them to create daily cash receipting reports and lacked daily bank reconciliation capabilities. Real time receipts also could not be printed for customers. When Walden staff contacted their provider's help desk, they often waited several days before their request was responded to or they received no response at all. As a result, the town sought a new software company that not only provided a cost effective solution and improved efficiencies, but that would approach the relationship as a supportive and responsive partner.

Like many communities, the thought of moving to a new software platform can be daunting. The implementation process is often accompanied by many challenges and can have financial implications if not completed with precision, timeliness and thorough planning. To minimize employee stress and the cost of transition, comprehensive training and ongoing support following the "go live" phase are also important considerations. After speaking with several communities and reviewing other software vendors, the Town of Walden determined that Caselle was the right fit.

THE SOLUTION

Since Walden needed to continue conducting business as usual, while transitioning to and learning a new system, they relied on Caselle to define a successful implementation plan. From the beginning, Caselle was committed to their success. Realistic expectations, project goals and potential challenges were identified early on so that the implementation process could be customized to meet the town's unique needs. A project plan and checklist also outlined tasks, assignments and milestones.

According to Town Clerk, Sherry Cure, "the checklist was incredibly helpful for our board. It not only helped us prepare, but it gave us transparency as to where we were at throughout the process."

In addition to Caselle's project planning, a dedicated team was assigned to work with Walden from start to finish. As the Caselle team worked closely with Walden staff, a natural working synergy developed; which ensured consistencies and a deeper project understanding. Because of Caselle's collaborative approach, Walden received support at every stage of their project that exceeded their expectations. "Caselle excels at communication" said Cure. "They frequently picked up the phone to check in or to give us updates. Our Project Manager helped us keep our momentum and always made sure our project was on track and moving forward. This was critical to a smooth transition."

As part of the implementation process, the town also participated in mock training and onsite training. The mock training environment allowed staff to practice in the software with their own data so that questions could be identified prior to the one-on-one training. Since the same trainer worked with the town throughout the implementation process, the trainer was already knowledgeable about the town's unique challenges. "The Caselle trainers are magnificent. We received personalized attention from our dedicated training team. They ensured we were equipped with all the tools we needed."

Since going live, the town has continued to receive ongoing support from Caselle; which has

"Everyone worked together really well to support our conversion. Our trainers were fantastic. The team spent a lot of time with me to make sure it was efficient and smooth."

- Sherry Cure
Town Clerk

minimized complications and has accelerated their return on investment. While implementing the new software has significantly improved Walden's efficiencies, it is the people at Caselle who have also made a significant difference. "Caselle staff are not only knowledgeable, but they are always willing to help and go the extra mile for their customers. They are committed to their jobs, and to making mine easier."

THE CONCLUSION

There are many factors that a community should consider when choosing a new government accounting software provider. For the Town of Walden, the support they received during and beyond the implementation phase was imperative. As a result of a clearly defined project plan, thorough training and Caselle's commitment to support, the town successfully implemented their new software within six months. Since migrating to the new platform, the town has decreased the time required to complete daily tasks by 50%.

* Data and statistics gathered in May 2018

