

CASE STUDY

Air Line Pilots Association supports 35 member airlines with Infor Financials & Supply Management

Air Line Pilots Association, known internationally as US-ALPA, is a union that represents and advocates for over 59,000 pilots from 35 US and Canadian airlines. ALPA has been advancing the piloting profession and aviation safety since 1931 and is the world's largest airline pilot union offering members airline safety, security, and pilot assistance; representation; and advocacy. ALPA sought to reduce operational complexity and improve reporting for its union members by migrating from Lawson S3 on-premises to Infor Financials & Supply Management in the cloud.



Headquarters

McLean, Virginia

Industry

Professional Services

Members

59,000+

Infor product

Infor® Financials
& Supply Management

Website

alpa.org

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BETH ROBINSON

Director of Finance and CFO, ALPA

A unique aviation community champion

ALPA is a trade union that acts as a collective bargaining representative for its members. Because of the nature of the organization, ALPA's finances have several different reporting requirements and must conform to specific labor laws. These laws require ALPA to be aware of the many details surrounding the finances, accounting, and administration of its accounts. Additionally, ALPA manages numerous budgets of, and has financial obligations to, all member airline pilot groups with its local representation. The complexity of ALPA's financials stem from dues collection and member management for its 59,000 union members.

Due to the compulsory nature of pilot union membership, member expectations are high. Lee Norstern, Assistant Director, Information Technology & Services at APLA, said, "We work in a very interesting and political environment where pilots pay dues, assessments, and fees to the Association and therefore there is a heightened expectation that quality services will be rendered. We have an obligation to our membership to meet expectations and provide reliable services."

Working to become the singular voice of the piloting industry, ALPA continues to recruit new pilot groups in the United States and Canada and demonstrate the organization's ability to act as the best representative to promote its collective interests. Counting airlines such as Alaska, Delta, FedEx Express, Frontier, Hawaiian, JetBlue, Spirit, United, and many others among its membership, only a few large US and Canadian airlines are not a part of ALPA. Membership with ALPA includes representation, legal support, event management, communications, accounting, IT infrastructure, insurance offerings and other member association services. ALPA also has a very active PAC organization focused on airline safety. In line with its overall mission, ALPA supports contract negotiations on behalf of members, assists in collective bargaining activities on behalf of all represented pilots, promotes member health and welfare before all government agencies including the Federal Aviation Administration, and defends the rights and privileges of members.

“ We realized that Infor Financials & Supply Management had the advanced approaches we needed and fit our unique requirements, and we did not have to try to do workarounds. Our people have learned the FSM platform and have the flexibility of accounting structure previous systems did not provide. The team feedback has been very positive. We love the cloud.”

LEE NORSTERN

Assistant Director, Information Technology & Services

The journey to improve accounting systems

ALPA utilized a very large legacy accounting system for over ten years without upgrades, due to a financial downturn and its effect on ALPA finances. When ALPA's finances improved, its IT and finance groups assessed the most modern replacement options available, including whether on-premises or cloud worked best for them. The limitations of disparate systems and workarounds, and serious maintenance challenges with a dated system that eventually caused software not to run on servers, motivated ALPA to act and find more capable and reliable software. To better manage its unique accounting structure, the goal was to find reliable solutions that would present the ability to grow and adjust.

Financial Controller Andrea Griffith pointed out, "When looking for modern accounting systems, many organizations like ALPA are asked if they are a small, medium, or large organization. ALPA does not neatly fit into these categories and is more of a small-large operation with complexities that require flexibility to support their unique structures. ALPA ran into challenges when trying to find off-the-shelf products that would help us to bill, track, and maintain member accounts. We needed something in between and beyond traditional association needs that could be tweaked because of our obligation to present financial data to pilot leadership and other unique regulatory filings."

Reporting for the association is another key area where ALPA intended to improve since it allocates money and need to report monthly on those accounting activities. ALPA also wanted to find an agile system that could be used into the foreseeable future and realizing a strong return on investment.

ALPA tried to get a feel for what was best for the association; after considering various products, the corporation chose the Infor cloud as the best option to adjust and grow. ALPA first implemented Infor's Lawson system on-premises, but once Infor Financials & Supply Management became available, ALPA made a second transition to help overcome on-premises system limitations, expand flexibility, and simplify accounting.

Successful implementation strategies

Past software implementations had been challenging and after considering other options, ALPA chose to work with Infor as its implementation partner. Norstern added, "We chose the Infor platform first and then searched for an implementation partner. We interviewed several vendors and kept coming back to Infor. We strongly recommended Infor to internal stakeholders because we wanted to collaborate with the people closest to the product and wanted to be strategic partners with Infor."

During the implementation interview phase, it was important to ALPA that the partner understood the past pain from other implementations it wanted to avoid. ALPA also sought to work with a partner that would make the company feel heard. Griffith remarked, "The Infor team was great. We took a lot of time to choose our team and Infor worked with us to help get the right people involved. Infor helped us stay on track and work closely from the beginning and it was a true collaboration and that was key to our success."

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ANDREA GRIFFITH
Financial Controller, ALPA

ALPA had a specific budget and timeline. While ALPA worked alongside Infor, the pandemic hit and suddenly everyone was working remotely. The company went live during the 2020 pandemic and, pre-pandemic, ALPA was not already operationally set up for a fully remote workforce. Despite the new challenges, ALPA came in on time and under budget while working remotely. Norstern said, "That tells you how great collaboration was with Infor. They worked with us and we worked with them to find a middle ground on issues as they arose. The IT staff has also embraced using the product and tools set that comes with Infor FSM."

Griffith commented, "Our solution consultant made sure we were on track and made herself available to assist with issue resolution. We routinely met with her during the engagement and knew she was meeting with the Infor team on our behalf on various issues as they arose. She was key to communication and the project and did a great job. Kudos for hearing us."

Solutions in the cloud

ALPA found a cloud deployment beneficial in several ways. Norstern said, "When we were on-premises, we did a poor job keeping up to date with patches and updates. It is easy to ignore until something breaks. With cloud we don't have to worry about routine maintenance." The Infor cloud and financials solution helped ALPA improve in several key areas:

Less setup: There was no dedicated space required for a room full of servers and the out-of-the-box capabilities were significant.

Automatic updates: Past update failures were now avoided with monthly automation.

Easy integrations: The new solution worked seamlessly with other systems and integrations were not a roadblock.

Simplified reporting: It had options in a solution that supported the company's unique reporting requirements.

Agile system: The cloud solution created more flexibility, agility, and longevity to promote growth.

True collaboration and partnership

ALPA's transition to a more productive and simplified accounting structure underscores the trusted partnership with Infor, beyond technology. ALPA transformed its accounting experiences and outcomes in a dramatic way despite the changing global landscape. During the pandemic, ALPA added six more airlines to the union. The accomplishments of daily tasks have been made easier and ALPA continues to serve membership at a high level with the power of sophisticated yet intuitive software and the support of a reliable partner.

Beth Robinson, Director of Finance and CFO at ALPA, said, "We are excited to have transitioned to Infor Financials & Supply Management because staff find it much easier to use. FSM utilizes improved data structures that facilitate operational and analytical reporting, and we look forward to never having to perform a major upgrade again as Infor continuously improves the product in the cloud."

Business results

ALPA has also found that with the Infor cloud, built on Amazon Web Services® (AWS®), and Infor Financials & Supply Management, it was better able to:

- Reduce total cost of ownership and free up capital to support growth initiatives
- Speed time-to-value with rapid deployment
- Quickly scale infrastructure to support a growing business
- Automate previously manual tasks and processes across operations
- Gain real-time visibility across the entire enterprise

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Infor builds business software for specific industries in the cloud. With 17,000 employees and over 67,000 customers in more than 170 countries, Infor software is designed for progress. To learn more, please visit www.infor.com.

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