

Executive Summary

Previous Solution:

- Microsoft Dynamics SL

Results with Sage Intacct:

- Simplified multi-entity consolidations
- Improved grant management
- Increased visibility into spending
- Saved \$100,000/yr in headcount costs

“Sage Intacct has been a lifesaver for us, increasing productivity so we can manage MHA’s growth without adding more headcount to the finance team. This saves around \$100,000 every year, and frees my time to be proactive, rather than reactive, in my job.”

—Sherrie Hogan,
Finance Director, MHA

In Search of Modern Financial Management

MHA, an Association of Montana Health Care Providers, serves members across the state with a variety of education programs and other services. Structured as three distinct subsidiaries—an association, a not-for-profit foundation, and a for-profit services venture—MHA’s financials became increasingly complex over time. As the foundation expanded from managing one to twenty federal, state, and private grants over the past few years, the organization’s finance team was challenged to keep up using its outdated ERP system, Microsoft Dynamics SL. The old software was difficult to use, relied heavily on batch processing, and required costly hardware and upgrades.

“Because we had to constantly log into and out of our three companies in order to find the information we needed or get anything done in Microsoft Dynamics, we wasted a week every month just managing inter-company transactions and balances,” said Sherrie Hogan, the finance director at MHA. “We decided it was time to get off our archaic financial system and go to a modern system in the cloud, so we reviewed Sage Intacct and NetSuite. After comparing the two, we determined that Sage Intacct better met our needs for flexible, multi-dimensional reporting and offered a lower total cost of ownership. We also appreciated that Sage Intacct had the stamp of approval from the AICPA.”

Boosting Productivity with Automation

Since the implementation, Sage Intacct has greatly eased financial processes across MHA’s three entities. Gaining the ability to share one vendor list and one customer list across the entire organization, the new solution has streamlined all accounts payable, accounts receivable, and general ledger entries. In addition, Sage Intacct completely automated the organization’s consolidations, and eliminated the cumbersome process of manually entering hundreds of inter-company transactions each month—cutting days out of its monthly close process.

The ease of integrating other software with Sage Intacct has also benefitted MHA. The association has connected several key business systems with Sage Intacct, including Adaptive Insights for budgeting, Paylocity for payroll, Joseph Eve's AssetEdge solution for fixed asset management, and CliftonLarsenAllen's allocation management app. All of these applications have pre-built integrations with Sage Intacct to deliver efficiencies that save MHA's finance team several hours of manual data re-entry work each month.

MHA has greatly streamlined its grant management. It is simple to add new grants to Sage Intacct and quickly produce grant-specific income statements, balance sheets, or any other reports the team needs to track restricted, temporarily restricted, or unrestricted funds. MHA has also adopted paperless purchasing and time and expenses processes with Sage Intacct's pre-configured approval workflows for grant directors.

Gaining Peace of Mind through Transparency

MHA dramatically improved its organizational visibility via Sage Intacct, building personalized dashboards for each grant manager with budget-to-actuals and year-to-date transactions, which help them to more closely manage their grants. With Sage Intacct's flexible general ledger dimensions, each individual transaction can be tagged with the type of program or service it applies to, down to the association's specific departments, individual seminars, and employees. As a result, managers can easily monitor funds at the line item level—something that was an entirely manual process before.

MHA's president and vice president also have their own dashboards that show the organization's real-time financials and cash on hand. "It's great to have full transparency for the whole the company. Everyone can see how we're doing at any point in time without waiting for batch processes to complete or for the finance team to manually run reports," noted Hogan.

About MHA

MHA—An Association of Montana Health Care Providers—offers a variety of services, including advocacy of members' interests with state and federal governmental agencies and legislative bodies, regulatory assistance, data products, education programs and communications.



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