

NET AT WORK AND SAGE INTACCT FUEL SUCCESSFUL PROJECTS FOR ALTERIS GROUP

Alteris Group

LEARNING | MARKETING | ENGAGEMENT

ALTERIS GROUP LLC

CHALLENGE

Separate location and multiple disparate applications led to manual workflows, duplicate data entry, and poor project visibility.

SOLUTION

Following a Net at Work Business Health Assessment (BHA), Alteris Group selected Sage Intacct to help address its strategic priorities.

RESULTS

- Increased visibility into project costing, status, and profitability
- Saving two days each month on duplicate timesheet entry
- Two additional days saved monthly on billing tasks
- Fully integrated timesheet, project management, and accounting solution drives efficiency and supports growth
- Minimized IT costs while supporting a distributed, international workforce through secure, remote access

Alteris Group, LLC helps its clients communicate better and more easily with their employees and their customers. The company specializes in developing customized employee training programs and marketing communication campaigns that engage their audiences and deliver results. When the company sought to integrate its timesheet and client billing workflows, it found one cloud-based Next-Generation Enterprise Resource Planning (ERP) solution capable of the task, and one partner with the skills and expertise to make it happen. Alteris Group selected Net at Work to implement and support Sage Intacct as its new business management solution.

NEXT-GENERATION PROJECT MANAGEMENT

“We’d been using Microsoft Dynamics SL for nearly two decades,” recalls Hannah Rees, Senior Project Manager for Alteris Group. “While elements of it still worked fine, too many processes were being handled manually or in the other, disconnected applications. Timesheets were a particular problem for us. We had a custom timesheet system in house, but it didn’t integrate with our billing system. Overall, it was inefficient to maintain and cut into our staff members’ productivity.”

Rees says the company zeroed in on Sage Intacct as its next-generation solution early on. Alteris Group also considered Microsoft applications it felt could have worked, but selected Sage Intacct, largely because of the Net at Work consulting team. “Net at Work is the kind of partner we try to be to our own clients,” explains Rees. “They’ve been invaluable to us. They listen to what we need and offer best practice suggestions for getting us there. Throughout the implementation process, they asked questions to understand our goals and even prompted us to rethink and revise some of our old ways. I think, together with Net at Work, we are a terrific team.”

MAKING SMART USE OF TIME

The company has two offices, one in Michigan and the other in Ontario. Previously, each office had separate timesheet systems but all the invoicing was performed in the U.S. office. “We had to re-enter all the timesheet

“With Sage Intacct and Net at Work we’ve gone from multiple, disconnected applications sitting on an in-house server to a completely integrated solution that lives securely in the cloud.”

data from the Canadian system into the U.S. system and then export the whole thing to Excel to create the invoices, and then re-enter the invoice data into Dynamics,” explains Rees. “It sounds confusing because it was. Lots of duplicate data entry, lots of time wasted, and of course, more potential for human error.”

Today more than 80 of Alteris Group employees and contractors use the Time and Expense feature within the Sage Intacct Project Costing and Billing module to record their time. It offers an intuitive, user-friendly interface that sped adoption rates and is generating positive reviews from users.

SPEED THE BILLING CYCLE

Many of Alteris Group’s customers ask to receive invoices in a particular format. “We used to have to create them manually in Excel each month,” recalls Rees. “But we can customize the Sage Intacct project invoices to provide the right data in the right format for each of our customers. That results in a huge time savings.”

With Sage Intacct, Alteris Group’s finance team can focus on preparing invoices, reviewing key metrics, and closing the books. The team no longer needs to spend time following

up on professional staff for late timesheets or nudging managers to complete their approvals. Instead, Sage Intacct automatically alerts the team of a late or rejected time entry to keep the process driving forward.

GAINING DAYS OF BILLABLE TIME

Rees says that while time savings wasn’t the principal reason for moving to Sage Intacct, Alteris Group is saving a significant number of hours each month. “We’re saving nearly two full days each month on billing tasks and another two days of savings by not re-entering timesheet data,” she says. “That’s four days’ worth of billable hours we gain every month.”

Rees says this overall efficiency increase was the company’s main goal in moving to Sage Intacct. “The company’s management team understands that to scale the business profitably, we need to make use of technology tools that help people work smarter and focus more time on billable work.”

VISIBILITY PROMOTES ACCOUNTABILITY

One of the biggest benefits Alteris Group sees with Sage Intacct is related to the visibility into its

projects. “Before, we only had updated project cost data once a month, during billing,” explains Rees. “So, literally, a month would go by before we accurately knew that we were close to budget or over budget. Now, with Sage Intacct, this information is available in real time. It means we can start having conversations with customers earlier, letting them know where the project stands. It means we’re proactive, not reactive and are more accountable as an organization.”

Project managers and their teams stay in the loop through access to project dashboards and reports that deliver insights into all the critical aspects of their projects, allowing for proactive collaboration and action.

VALUE DELIVERED

Rees concludes, “With Sage Intacct and Net at Work we’ve gone from multiple, disconnected applications sitting on an in-house server to a completely integrated project management, time tracking, and billing solution that lives in the cloud. Access is fast, reliable, and secure, and the support we receive from Net at Work helps us to continue to derive more value from the solution.”

About Net at Work

Founded in 1996, Net at Work is the largest implementer and supporter of Next-Generation ERP solutions for small- and mid-sized businesses throughout North America. Along with CRM, HCM, and managed services, Net at Work offers a rich portfolio of technology, expertise, and services to help companies derive value from the transformative effects of technology. To start unleashing the power of your business, visit www.NetatWork.com.