



Client Success
CHILDREN FIRST
NOT-FOR-PROFIT

OPTIMIZING FINANCIAL OPERATIONS FREES ADDITIONAL RESOURCES FOR THE MISSION

Children  First

CHILDREN FIRST

CHALLENGE

Most of the organization was leveraging modern technology, but the finance department was lagging behind with zero remote system access, lengthy, paper-based processes and risk and fees imposed by its off-site paper record storage.

SOLUTION

Guided by the technology experts at Net at Work, Children First migrated from Sage 300 to Sage Intacct, hosted in a Canadian data center.

RESULTS

Through its partnership with technology advisor Net at Work, the organization is maximizing its efficiency through the functionality offered by the modern, cloud-based financial management solution, including streamlined financial reporting, time-saving automated approval workflows, and dashboard visibility into its mission-supporting data. The organization is expected to gain a TCO savings in excess of \$20,000 over five years.

Children First is an essential resource for families of children with developmental delays or difficulties living in the City of Windsor and the surrounding county of Essex, Ontario. The organization's family-centered approach pulls in a broad array of resources, including mental health services, speech and occupational therapy, childcare resources, parental support, and more — creating an individualized plan that optimizes every child's opportunity to thrive.

While most of the organization rapidly invested in modern technology to support its client-facing mission, its accounting operations were getting by on an older system that required too much time and too many resources to maintain. "The rest of the organization has gone digital, and accounting was feeling a bit behind," recalls Jane Patterson, Administration Manager at Children First. "We wanted the benefits and advantages modern technology provides — greater workflow efficiencies, less paper, and remote access for our team." The pandemic accelerated the importance — and the urgency — of adopting such technology.

PANDEMIC MAGNIFIES TECHNOLOGY SHORTCOMINGS

Prior to the pandemic, Children First was not well positioned to support a work-from-home workforce with its decade-old, server-based Sage 300 application. "It served us well for years, but the pandemic really highlighted the shortcomings of a server-based application," Jane says. "We couldn't access the system remotely, which made our work very difficult."

To enable it to move forward with its digital transformation, Children First turned to its trusted business partner and technology advisor, Net at Work. The New York-based consultancy serves over 6,000 small-to-medium-sized businesses (SMBs) throughout North America by providing a complete offering of software solutions, services and expertise to properly support the entire organization. Through its extensive work with other not-for-profit organizations, the Net at Work team has gained a deep understanding of what matters most to the mission, and how to make change happen in practical, impactful, and measurable ways.

CLIENT SUCCESS: CHILDREN FIRST



“We gained the impetus to go beyond the status quo and invest in internal efficiencies that free our staff’s time for more strategic, value-added tasks. Those efficiencies, we believe, will ultimately lead to cost savings and productivity increases that positively impact our mission.”

“They’ve been our partner for over a decade, and we trust Net at Work to provide us with the best advice and the best direction,” Jane says.

The organization had begun researching a cloud-based financial management solution to replace Sage 300 prior to the pandemic — but ran into a hurdle during its search. “Net at Work helped us identify the best options, and together we selected Sage Intacct as the ideal replacement. However, due to our not-for-profit status, we have data residency and privacy laws we must comply with, and initially, Sage Intacct didn’t have a Canadian presence. That put it out of our research for the time being.”

So, when Sage Intacct opened a Canadian data center in mid-2021, Net at Work and Children First acted quickly to make the transition.

STREAMLINE CORE FINANCIAL PROCESSES

Today, with its Sage Intacct-powered financial hub, Children First is streamlining core financial processes, building operational efficiencies and saving staff time. Purchase approvals, for example, used to be a cumbersome, paper-based process. “Before, employees would print out a purchase request and carry it to manager one for approval, then manager two, and then to the finance administrator,” explains Jane. “During the process there was no way to know where the request was or what status it was in.” This process was rendered ineffective once the COVID-19 pandemic hit, and employees weren’t able to return to their desks to keep approval chains advancing.

Now, the purchase request and approval process is completely automated — and paperless. Net at Work helped the organization set up approval workflows that determine the correct routing for each request based on the purchase type and amount. The automation has cut the approval timeline in half and provides the finance team with greater insight into pending requests, which helps with budgeting and cashflow projections.

“Just this one step will save us hours every month — and real dollars too,” says Jane. “Finding an invoice or requisition used to mean heading to the file room and looking for the paper copy. Now, we store everything electronically within Sage Intacct. Plus, we were paying for off-site paper records storage that we’ll no longer need. Every little piece of efficiency means more money toward our mission.”

OVER-THE-TOP PROFESSIONALISM

Jane praises Net at Work for its over-the-top professionalism during the migration. “We needed to preserve a full seven years of history —likely millions of transactions,” she says. “Net at Work was outstanding throughout this process. They clearly understood our



goals and objectives and created a solid plan that made the conversion a success.”

Net at Work used a proprietary tool its development team built to streamline and speed up the data conversion process. At the same time, a sandbox environment was granted so Children First could review, compare, and confirm data accuracy before it was imported into Sage Intacct.

Net at Work continues to be the organization’s first line of support for all things Sage Intacct. “I love their helpdesk team,” Jane says. “They are always very available, responsive, and quick. We feel like our account matters to them.”

DIMENSIONS SIMPLIFY COMPLEXITY

The dimensional general ledger structure of Sage Intacct has proven transformative for Children First. “We had a very large, very cumbersome chart of accounts before,” notes Jane. “We needed accounts for each department and fund, for example. Now we use dimensions to hold those values, meaning our chart of accounts has shrunk to a manageable and meaningful size. And adding a new department no longer means adding an entire series of new accounts.”

In addition to simplifying the chart of accounts, dimensions allow for much richer and more granular reporting. “We’re able to look at our data from different perspectives much more easily than before,” says Jane. “We can quickly isolate data from specific funds, for example, or a list of departments, whereas our old system required exporting to Excel. We’ve just begun to realize all the benefits of the transition. But already, Sage Intacct is making a difference in how effectively we can share data with stakeholders and build collaboration across our teams.”

LOWER TOTAL COST OF OWNERSHIP

Previously, the burden of Children First’s dated technology kept the finance team in a reactive mode, as it lacked the tools and streamlined processes that promote better resource utilization. “As a not-for-profit, we are continually focused on maximizing stewardship and doing more with less,” explains Jane. “We now have an accounting application that supports us in those efforts and allows our finance team to be more proactive and effective in our tasks.”

In hindsight, Jane believes that successfully meeting the challenges of the previous two years has made the organization’s finance operations stronger and more agile. “We gained the impetus to go beyond the status quo and invest in internal efficiencies that free our staff’s time for more strategic, value-added tasks,” she concludes. As a result of those efficiency gains, Net at Work analysis points to an expected total cost of ownership (TCO) savings of over \$20,000 over five years.

ABOUT NET AT WORK

Founded in 1996, Net at Work is a leading technology advisor to thousands of small-to-medium sized businesses throughout North America. The award-winning consultancy offers a rich portfolio of technology, expertise, and services to help organizations derive value from the transformative effects of technology. To start unleashing the power of your business, visit www.NetatWork.com.