



Client Success  
**UPJOHN INSTITUTE**  
NOT-FOR-PROFIT

## EMPLOYMENT RESEARCH GROUP ELEVATES BEST PRACTICES AND FREES RESOURCES FOR ITS MISSION

W.E. UPJOHN  
**INSTITUTE**  
FOR EMPLOYMENT RESEARCH

### CHALLENGE

The Upjohn Institute wanted its finance team to play a more strategic role in the organization's future, and to do that, it needed to replace its older version of Abila MIP with a modern, cloud-based solution.

### SOLUTION

The organization selected Sage Intacct as its Next Generation financial management solution, in part due to its recognition by the AICPA.

### RESULTS

- Smart rules ensure accuracy and improve internal controls.
- Dedicated project management tool boosts collaboration and accountability.
- Use of dimensions shortened and simplified a complex chart of accounts.
- Finance team scored 100% in a recent employee engagement and satisfaction survey.

### A VISION FOR THE FUTURE

During the Great Depression, William Erastus Upjohn, founder of The Upjohn Company (now part of Pfizer) embarked on a grand experiment. He provided land for displaced workers in the community so they could plant a garden or work on the company's farm co-op. His passion for the initiative was evidenced by the establishment of a generous endowment and a few years later the W.E. Upjohn Institute for Employment Research was founded. Today, the Upjohn Institute carries on the work of its founder, funding extensive research on topics surrounding employment — and unemployment — from its offices in Kalamazoo, Michigan.

The Upjohn Institute puts its research findings to work as it also manages the Michigan Works! Southwest, a four-county organization that prepares a qualified workforce to meet the current and emerging needs of business and industry. It's a busy organization with complex and varied funding sources, projects, and locations. To keep everything — and everyone — working efficiently, the Upjohn Institute engaged the professional services team at Net at Work to help it migrate from Abila MIP, a legacy accounting software, to the Association of International Certified Professional Accountants (AICPA)-endorsed Sage Intacct.

### FINANCIAL SOFTWARE BUILT FOR MODERN NOT-FOR-PROFITS

When Kathy Breyfogle joined the Institute as CFO, she was charged with moving the organization off its 20-year-old server-based application and on to a modern, cloud-based financial management solution.

"I was hired as part of an effort to help the organization modernize our financial operations, implement process improvements, and expand our department's reach and strategic impact," she says. "To do that, we all recognized we needed better data from our accounting system."

## CLIENT SUCCESS: UPJOHN INSTITUTE



*“We hear from employees that Sage Intacct allows them do a better job of helping our customers.”*

Kathy says she quickly zeroed in on Sage Intacct as the organization’s Next Generation financial management solution. “Our go-to technology advisor, Net at Work, also helped us review Blackbaud Financial Edge and an updated version of MIP, but without exception, every member of our team selected Sage Intacct as the winner.” She continues, “Sage Intacct has a more professional, consistent user interface, and the fact that it’s the only solution to be endorsed by the AICPA impressed us and gave our auditor’s confidence.”

The decision to migrate to the cloud coincided with the start of the pandemic. The sudden closure of its offices highlighted the shortcomings of the Institute’s server-based application. “Initially, we couldn’t access our old software remotely at all,” Kathy recalls. “Then we got a VPN set up as an interim step, but it was slow and cumbersome. It confirmed that a move to the cloud with its simplified remote access was the right decision.”

### OPTIMIZED TRANSITION

Once the Upjohn Institute decided on Sage Intacct, Net at Work successfully led and guided the implementation. “They represent both Abila and Sage, and we’ve worked side by side with them for nearly 20 years, so there’s a great deal of trust between the two organizations,” Kathy says.

Net at Work’s knowledge of the Upjohn Institute’s operations both sped up and simplified the upgrade. “They know us, and they are experts in both products,” Kathy notes. “That allowed them to directly map our existing workflows into the new system and optimize those workflows simultaneously.”

With Net at Work’s help, the Upjohn Institute brought two years of transaction detail and an additional year of account balances from Abila MIP into Sage Intacct, allowing teams to be productive right from the start. “Net at Work is our single point of contact for all things technology,” Kathy says. “We use them exclusively for questions and support — we’ve never felt the need to contact Sage.”

### A NEW DIMENSION TO DATA ANALYSIS

Net at Work’s consultants showed the Upjohn Institute how it could make strategic use of the dimensions feature in Sage Intacct. “We used dimensions to completely revamp our chart of accounts,” Kathy says. “Previously, we had to create a set of accounts for each location, fund, and department — but now that data is held in the dimension fields. In addition to simplifying our account structure, using dimensions provides more granular reporting into our projects and our funding — data that was exceedingly difficult to draw out before.”





As a further improvement, the Institute has set up smart rules in the software that restrict the use of certain project, fund, or account codes in specific circumstances. “We were able to create dimension rules so every entry (manual or imported) is rejected if a dimension is accidentally used that shouldn’t be associated with a specific entity,” Kathy explains. “My staff spends less time double and triple checking their work because we’re all confident that Sage Intacct is checking for us.”

The organization also configured smart events to notify Kathy whenever certain transactions occur. “This is a huge plus for internal controls, and frees up my time because some of my process audit work is now automated.”

## PAPERLESS WORKFLOWS AND STREAMLINED AUDITS

Another win for the Upjohn Institute is the elimination of paper files and the streamlined workflows and cost savings that result.

“By necessity we’d started scanning documents during the shutdown, but we still had to store and manually route the documents around the organization,” Kathy explains. “However, Sage Intacct allows us to associate electronic attachments with any transaction or entity. It provides instant access to supporting documents which makes my accounting team look like the experts that they are — and it has allowed us to eliminate paper files and filing cabinets.”

The change is also expected to save the organization money. “Our state audit is taking place now, and we can immediately access supporting documents — and even provide the auditors with their own login to Sage Intacct so they can view and review the business. We expect

to see a significant cost savings in our audits simply because they’ll be able to complete their work more quickly and with less back and forth with our teams.”

## IMPROVING PROJECT COLLABORATION

The Upjohn Institute uses the Sage Intacct Projects module to track the contracts it establishes in its research division. The Institute’s accountants quickly adopted the tool, which gives them a flexible structure to manage the time, resources, and funding surrounding their projects, and share that information with colleagues. As a result, they can easily monitor key performance indicators to keep an eye on project costs and clearly see how each project is advancing.

“Previously, we relied on a combination of paper documents and spreadsheets to track contract and billing details,” says Kathy. “It didn’t allow for our teams to share and collaborate on our projects. Sage Intacct provides us with a purpose-built tool to track, manage, and share all aspects of our projects. It’s an enormous improvement.”

## VISIBILITY INFORMS DECISIONS

Due to the way the Institute receives state funding, it cannot close its books until mid-month. “In the old system, that meant that our staff didn’t have their budget and funding data until the 20th of each month — too late to make any course corrections,” Kathy explains. “Now, they all have dashboards in Sage Intacct that provide current data throughout the month. With this change, our teams are able to be proactive, not reactive. They’re able to access the data they need independently and use it to make informed decisions. They’re leading from the front now, not playing catchup.”



***“We see quality improvements across all of our processes. The workarounds and manual tasks are gone, replaced with automated workflows and quick access to decision-making data.”***

## 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 begin unleashing the power of your business, visit [www.NetatWork.com](http://www.NetatWork.com).

## DEMOCRATIZING DATA

The reporting flexibility Upjohn Institute has gained is a game-changer, Kathy says. “We can run financial reports that cater to our various stakeholders. For example, we’ll produce consolidated financial reports that give our executive team and me a clear picture of the health of the organization. Various board members, though, might only want to see reports on specific funds or a grouping of funds supported by the endowment. It’s that kind of flexibility that adds real value to the application.”

The accounting team uses the report scheduling feature in Sage Intacct to automatically generate a list of reports and deliver them to stakeholders. “Everyone speaks highly of the reporting capabilities,” Kathy says. “They especially love the ability to drill down into the data to uncover the source transactions and attachments, rather than search a paper file.”

## 100% EMPLOYEE SATISFACTION

The Institute recently conducted employee engagement and satisfaction surveys among the accounting team. The results, Kathy says, were nothing short of extraordinary. “The industry average is about 35%, but we were hopeful we’d do better than that. In fact — we received a perfect score on both engagement and satisfaction! While we can’t attribute all of that to Sage Intacct, the application deserves much of the credit. We hear from employees that they are thrilled to have the right tool to help them do their jobs. They tell us Sage Intacct helps them do a better job of helping our constituents.”

## CLOUD TECHNOLOGY ELEVATES OPERATIONS

The combination of Net at Work’s technology services and Sage Intacct’s capabilities have elevated the Institute’s financial operations. The new solution provides the internal controls that not-for-profits like the Upjohn Institute require, including strong login security, role- and user-based permissions, segregation of duties, configurable approval processes, and detailed audit trails.

“We see quality improvements across all of our processes,” Kathy concludes. “The workarounds and manual tasks are gone, replaced with automated workflows and quick access to decision-making data. Our teams are better able to share data and collaborate with stakeholders throughout the Institute and beyond. Overall, we’re able to react more quickly and spend more time on activities that help grow the organization’s impact and reach.”