



Every Company Has “That One Manual Thing” — What’s Yours?

CASE STUDY

Eliminating the Weekly
Bottleneck with Automations
for a Shared Financial
Services Company

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In almost every finance or accounting department, there's that one process everyone dreads. The task that eats hours of valuable time, requires repetitive clicks or signatures, and carries a higher risk of mistakes than it should. It's the kind of work that keeps staff from focusing on more important things—yet somehow it persists because “that’s just how it’s always been done” or maybe “it’s too complicated to automate.”

For Bristol Bay, a full-service accounting and finance firm supporting more than 30 companies, that process was weekly payments.

MEET BRISTOL BAY

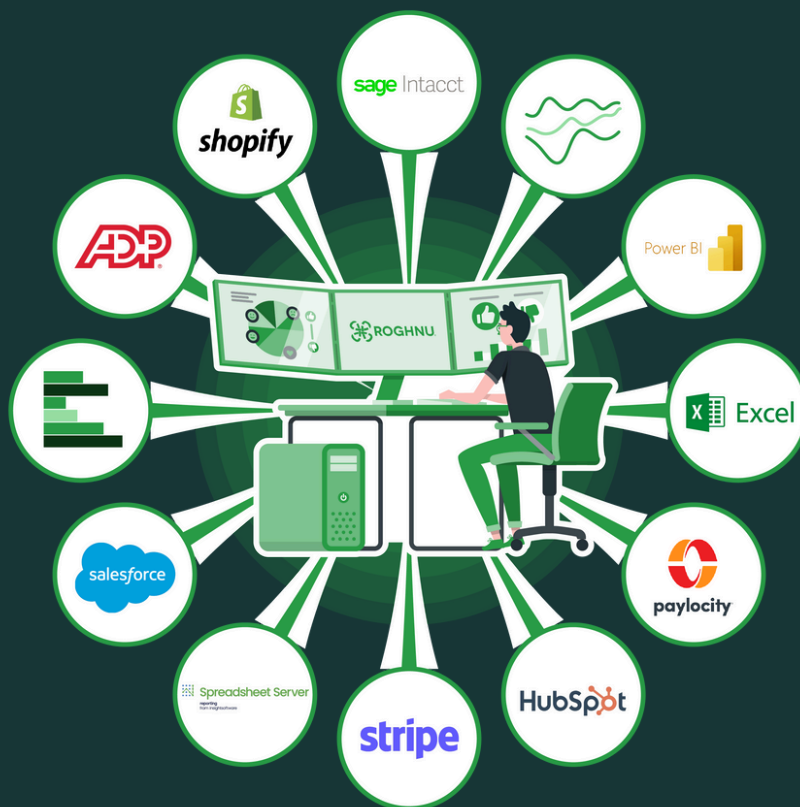
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Bristol Bay provides outsourced CFO, controller, and back-office support to a diverse portfolio of businesses. Their clients rely on them for timely, accurate financial operations, from day-to-day bookkeeping to high-level financial strategy. With multiple entities under management, Bristol Bay's team handles a high volume of transactions each week, across a wide range of industries and bank accounts.

All Your Data. All in One Place.

The Roghnu Data Warehouse centralizes your financial and operational data into a single, secure hub.

No more jumping between platforms or reconciling inconsistent reports—just one connected source of truth that powers automation, faster decisions, and smarter growth.



UNDERSTANDING THE ISSUE

Managing payments for 30+ companies every week had become heavily manual and time-consuming. For each company, staff had to:

- Upload separate NACHA files for each bank account.
- Print physical checks, obtain signatures, and prepare them for mailing.
- Stuff and stamp envelopes for distribution.
- Repeat the entire process, one company at a time.

This consumed significant staff time each week. Hours and hours that could have been better spent on oversight and client service

*Beyond inefficiency, the sheer number of **manual touchpoints created opportunities for errors, delays, or missed payments.** As Bristol Bay expanded, the process was becoming unsustainable.*

ROGHNU'S DATA WAREHOUSE SOLUTION

Roghnu implemented a custom application built on the Roghnu Data Warehouse to automate Bristol Bay's payment processing.

Here's a rundown of how it works:

1. Data flow from Sage Intacct to the Data Warehouse: Payment data for all companies is imported into the Data Warehouse.

2. Data organization and cleanup: The warehouse organizes, standardizes, and validates the data, ensuring accuracy and consistency across all entities.

3. File creation and return to Sage Intacct: A consolidated payment file is generated and sent back into Sage Intacct, ready for bank upload.

4. Bank processing: The single file is uploaded directly to the bank, which took over processing ACH payments, printing/mailing checks, and updating Positive Pay data to mitigate fraud.

This shifted the burden of manual uploads, printing, and mailing away from Bristol Bay's staff and into a single, automated workflow.



The Proven Results

The results of our partnership have been significant for Bristol Bay, including:

- **Time savings:** The new process saves about 4 hours each week or 16 hours a month.
- **Efficiency and reliability:** Payments are processed faster and with fewer opportunities for error.
- **Scalability:** Bristol Bay can now handle payments for 30+ companies (and more as they grow) without expanding staff.
- **Higher-value work:** Staff time is reallocated from repetitive tasks to analysis, oversight, and client service.

Bristol Bay's story is just one example, but nearly every finance team has a version of it. A repetitive, manual process that eats away at productivity and limits growth. With the Roghnu Data Warehouse and custom automation, these processes can be reimaged into streamlined workflows that save time, reduce risk, and scale with your business.

WHAT'S YOUR "MANUAL THING" THAT'S EATING AWAY AT YOUR TEAMS' PRODUCTIVITY?

Let us show you how we can help you automate it. Contact us for a personalized demo or discovery call.



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