

## Clinical & Support Options: Growing Out of One Solution and Into Something Better

Few nonprofits have a mission as diverse as Clinical and Support Options (CSO). The organization extends access to behavioral health and family support services to people across parts of Massachusetts. The group also runs after-school programs, helps to fight homelessness, and provides vocational and rehabilitative training. CSO takes a holistic approach to community support, targeting a variety of intersecting obstacles that hold people back. In that way, CSO has a profound and lasting impact on everyone it serves and often on their families too.



Beginning in 2012, CSO started using Fund EZ to handle financial management. Initially, the software worked great. However, as CSO began to grow, adding new users and accounting obligations, Fund EZ struggled to keep pace. According to CFO Clinton Thornton, there wasn't a specific point when the software became unsustainable, but it was clear the existing solution couldn't scale with the nonprofit.

"Based on our strategic plan versus where we were, I didn't see the system supporting us 2-3 years in the future." Clinton began looking for a replacement, relying primarily on online tools to suggest options appropriate for nonprofits structured similar to CSO. Some of the features he was looking for included:

- Cloud-based software that would be accessible across the multiple locations CSO operates
- User-friendly features that did not require extensive training or technical expertise
- Scalable solutions that could grow as quickly and expansively as the nonprofit required
- Interfaces that would automatically update with real-time data
- Software costs that were lower than options from Oracle or SAP

### CHOOSING SOFTWARE TO MEET TOMORROW'S NEEDS

After some online research, Clinton created a list of five software options that included Netsuite and Sage Intacct. He scheduled demos with three of the five, and by the time they were all over, Sage Intacct was a clear choice.

"After comparing the Sage Intacct demo to the others, it seemed like a solution we could use immediately. The user interface and the navigation tools, to say nothing of the underlying features, made me think this was the one."

The initial demo proved to be serendipitous for several reasons. First, because CSO ultimately decided to implement Sage Intacct. But also because JMT Consulting was randomly selected to perform the demo. From previous experience, Clinton knew that having the right implementation specialists and consulting partners was crucial for leveraging new technologies. Now, over the course of several hours, CSO had discovered all the resources it needed to facilitate the finance department and fulfill its growth potential.

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## MEASURING THE IMPACT AFTER THE IMPLEMENTATION

Sage Intacct was up and running by the first of July 2017, and JMT Consulting handled all of the hard-coding and user training. "They were instrumental in providing us that conduit between what we need and what Sage Intacct can do," says Clinton.

The benefits have been widespread, but the CFO points out a few that have had the most significant impact on CSO:

- Improving accessibility across departments and locations
- Having data organized to support the audit process
- Using access controls to improve cybersecurity around sensitive data
- Cutting paper usage by as much as 80%
- Giving non-technical, non-accounting users tools they can still understand
- Offering data dashboards to decision-makers who need information on demand

Clinton singles out the reporting process as the biggest area of improvement compared to what came before. "I left our accountant to her own devices, and she's created some fantastic reports using smart rules and the custom report writer. She's really digging into all the Sage Intacct has to offer, and every other month there's something new she discovers. The way we can dice and slice information makes a world of difference."

JMT Consulting has also proved to be a valuable partner over the past three years. Clinton particularly appreciates their focus on nonprofits. "There are certain intricacies to nonprofits that a lot of folks don't know or understand. Being able to have a discussion with JMT about certain parts of the balance sheet or revenue recognition and having them understand that was a very important piece."

CSO also trusted JMT to implement Nexonia, a cloud-based solution for expense and time reporting. As CSO has grown from managing six official credit cards to 35, spread among individuals throughout Massachusetts, having the right tech has proved invaluable. "It makes life so much easier, and the people who use it love it."

Asked how Sage Intacct supports the mission of CSO, Clinton is explicit about the important role it plays. "We needed a finance system that was going to support our growth and prepare us for industry changes that will happen over and over again. The ease of being able to make those changes without needing wholesale system upgrades or vendor swaps is where Sage Intacct stands out."

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