



Preferred partner solution of



# CAS technology guide series: Non-Profit



## Introduction

Nonprofits are a great fit for client advisory services (CAS) practices, given CAS's ability to deliver a wide range of services with maximum efficiency.

How are CAS practices able to achieve this efficiency on behalf of their nonprofit clients? Through smart investments in technology enablers. And as the nonprofit market grows for CAS practices, firms need to ensure that they're making the right choices when selecting and expanding their CAS technology portfolios.

The right capabilities and technology investments can create efficiencies, strengthen financial stewardship, and drive greater impact. With that in mind, here are some of the most critical areas CAS practices should focus on to deliver meaningful value to their nonprofit clients.

## The context: Key issues

### **Rising interest rates & financing costs**

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# Core technology features

## Track payments by donor or grant

Automated AP allows nonprofits and CAS practices to track payments associated with each grant or donor.

## Centralized control

The ability to access all client accounts from one platform – or in the case of a multi-family office (MFO), multiple entities – greatly improves your practice's ability to manage complex data and improve your level of service.

## Intelligent automation

With AI and machine learning, many tasks that were once handled manually can be easily automated. Look for technologies that can save you and your staff time while preventing human error.

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## Uncompromising cybersecurity

Nonprofits are just as vulnerable to cyber risks as any business. New technology solutions should include advanced security features as a cost of entry, to help maintain clients' security and privacy.

# Critical questions

|                            |   |
|----------------------------|---|
| <b>Workflow efficiency</b> | <ul style="list-style-type: none"> <li>• Does this technology streamline a workflow?</li> <li>• Does it simplify your processes?</li> <li>• Does it save you time and resources?</li> <li>• Does the solution support multiple entities?</li> </ul> |
| <b>Access</b>              | <ul style="list-style-type: none"> <li>• Does the solution help move services to the cloud?</li> <li>• Is a mobile version available?</li> </ul>  |
| <b>Flexibility</b>         | <ul style="list-style-type: none"> <li>• Does the solution provide options that serve both your client and your CAS practice?</li> <li>• Is it easily customizable?</li> </ul>  |
| <b>Ease of use</b>         | <ul style="list-style-type: none"> <li>• Is it easy to onboard clients and CAS staff onto the platform?</li> <li>• How quickly can you get it up and running?</li> </ul>  |
| <b>Security</b>            | <ul style="list-style-type: none"> <li>• Will the solution have a positive impact on security?</li> <li>• Does it help eliminate or reduce risk in specific areas?</li> </ul>   |
| <b>Data</b>                | <ul style="list-style-type: none"> <li>• Does the solution provide you with analytics tools to extract insights from data?</li> <li>• Are data visualization capabilities built into the solution?</li> </ul>                                       |

# Top nonprofit solutions

## BILL Accounts Payable

BILL leverages technologies and digital processes to streamline accounts payable operations. It improves efficiency, making AP faster, more productive, and less costly for nonprofits. BILL integrates with the major accounting software platforms, reducing the effective chance of human errors.



AI-powered bill  
capture and coding



Simplify approvals  
process



Pay smarter – across  
payment options



Stay in sync with leading  
accounting systems



Multi-entity  
capabilities



Comprehensive,  
automated audit trails

## BILL Spend & Expense

This solution combines a company card with expense management software to streamline reporting and give construction companies more control over spend:



Business  
credit



Expense  
management tools



Budget management  
tools



Mobile app  
version



Virtual  
cards



Reimbursements  
tools

CPA.com has a wealth of information and insights specifically for CAS practices. To learn more be sure to visit

[CPA.com/CAS](https://cpa.com/CAS).

For more on BILL's solutions for nonprofits, visit

[BILL.com](https://BILL.com).