Acumatica Streamlines International Non-Profit's Financial Data Management

CASE
COUNCIL FOR ADVANCEMENT AND SUPPORT OF EDUCATION®

OVERVIEW

Founded in 1974; opened London office in 1994 and has continued to grow globally. In 2013, the organization switched from Microsoft Dynamics SL (formerly Solomon) and QuickBooks to Acumatica, improving financial reporting and enhancing productivity.

KEY RESULTS

- Improved productivity through an integrated, cloud-based system
- Significant savings of time and effort in monthly closing of books
- Stronger financial reporting on an international basis, with multiple currencies
- Four separate offices operate independently but have connected systems
- 24/7 support for all offices, in U.S. and international

SITUATION

CASE, the Council for Advancement and Support of Education, is an international non-profit organization with about 100 employees at its headquarters in Washington, D.C. and offices in London, Singapore and Mexico City. Its operating revenues exceed $20 million.

With membership including more than 3,600 education-related institutions in 76 countries, CASE offers professional development, training, networking and other resources for nearly 70,000 communications, alumni relations, marketing and fundraising staff, as well as leaders of the member institutions.

CASE's Director of Information Systems (prior), Adam Rosenbaum, says, "As an international organization, we operate in multiple currencies and have multiple boards to report to. With our old system, we had no interaction at all—the systems certainly did not talk."

Rosenbaum explains, "At headquarters, we were on the Dynamics SL 7.0 platform; the Singapore office was using QuickBooks' Asia-Pacific version; in London, they used QuickBooks' European version. Mexico was sort of jammed into the European QuickBooks since they started as an offshoot of that office. It had become a very disjointed operation."

CASE considered sticking with Dynamics SL, or switching to SAP or Intaact. SAP wasn't considered for long, due to the cost. As for Dynamics SL, Rosenbaum says they felt it was going to be difficult to manage internationally , essentially forcing the other offices to work with what headquarters was using. Regarding Intaact, Rosenbaum says, "It was very Solomon-esque, which appealed to Finance staff, but it was pretty much 'take our terms.' "

SOLUTION

Rosenbaum says after CASE received a recommendation to look at Acumatica, they did their due diligence and ultimately decided to buy Acumatica. Rosenbaum reports, "We were attracted by the flexibility of the financing and by Acumatica's unlimited user licensing model—whether we chose to host it ourselves or be on their Cloud, we could always have a fixed price." He notes that the Financial Suite met their initial needs and they decided to add Fixed Assets later.

CASE's Information Systems Director also appreciated the opportunity to have "a single platform to manage all of our international regional offices, and the ability to eliminate all the third-party software those offices were using."

Rosenbaum adds that CASE had another reason to choose Acumatica: ongoing support. "One of our concerns was 24/7 support. We say the sun never really sets on CASE—someone is always staffing something."

Company
CASE (Council for Advancement and Support of Education)
www.case.org

Industry
International membership organization serving colleges and universities, independent and international schools, and other non-profit organizations

Location
HQ in Washington, D.C., plus offices in London, Singapore and Mexico City

> ***"[Acumatica is] extremely reliable—a platform that is up and running 24/7 around the world. It's accessible to everyone, any time they need it; there's nothing from an Information System perspective that is stopping us."***
>
> – Adam Rosenbaum,
> Director of Information Systems,
> CASE (prior)

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BENEFITS

On the same day CASE launched Acumatica they also launched a new Membership Management System to handle the Accounts Receivable functionality. Thanks to Acumatica, Rosenbaum reports, "It's now all in one big efficient system, as opposed to many different ones. So now all the money is flowing into Accounts Receivable and meanwhile, all of the Accounts Payable is happening around the world."

He adds, "There's no more question now as to who wrote a check for what." In fact, he says, "They've eliminated check-writing in the UK now. Funds are just distributed electronically from Acumatica directly to the bank, and the bank takes care of the rest. This is very helpful."

With Acumatica, Rosenbaum says, "The other big benefit is consistency and data integrity, and the ability to consolidate all of these regional currencies into one world view, which is our United States dollar view—even though we do financial transactions in eight different currencies throughout the world. Multi-currency support was an absolutely critical feature for us that not all ERP vendors could deliver."

Another benefit their CFO appreciates, Rosenbaum says, is the transparency of the data; they can allow any user access to the system and the reports they might need: "We have good reporting now, in terms of where am I vs. my budget." In the past, he says, getting this information required constant emails between program directors and accounting staff. Rosenbaum adds, "The ability for all end-users to have access is great—from an Information System management perspective, it's almost like my work is done, which I could not be happier about."

Rosenbaum also reports, "We've eliminated at least two weeks off of our monthly close, if not more." Acumatica has allowed them to skip most steps they used to need: "We've streamlined it. We can close the books for a month usually in the first week of the next month. That is a huge benefit in terms of time, effort, and information that is now available."

As for the future, Rosenbaum says, "We are currently going through a strategic planning process for the next few years, and I believe that the information coming out of Acumatica is certainly going to help steer that discussion."

With Acumatica, Rosenbaum says, "We feel very comfortable that the software can support what we want it to do. It's extremely reliable—a platform that is up and running 24/7 around the world. It's accessible to everyone, any time they need it; there's nothing from an Information System perspective that is stopping us. Because the sun never sets on CASE, the sun can never set on CASE systems."

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TRANSFORMING COMPANIES

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