LifeSource Operates More Effectively; Saves More Lives with Acumatica ERP Platform

LifeSource
ORGAN, EYE AND TISSUE DONATION

OVERVIEW

LifeSource, an Organ Procurement Organization (OPO) operating in Minnesota, North Dakota, and South Dakota, operated on a legacy Sage financial system and spreadsheets that hindered operations and growth. The organization deployed Acumatica ERP, gaining real-time data visibility for better decision-making and more efficient operations while also acquiring remote access.

KEY RESULTS

- Implemented a single, connected, modern ERP platform, becoming more efficient
- Gained access from anywhere, improving operations
- Reduced aged invoices over 90 days by over 50%
- Increased efficiency with Acumatica workflows by 33%
- Improved automation and data entry efficiency by 40%
- Eliminated hours of manual data input, making employees more productive
- Improved reporting with role-based dashboards, providing executives with transparency into operations
- Recouped hours per employee, allowing them to concentrate on higher-level tasks

CHALLENGES

LifeSource is a leading Organ Procurement Organization (OPO) operating in Minnesota, North Dakota, South Dakota, and western Wisconsin. The non-profit organization, which has the second largest footprint in the nation, facilitates organ, eye, and tissue donation between hospitals and transplant centers. Its mission is to save lives and offer hope and healing to families whose loved ones chose to save the lives of others.

LifeSource works with grieving families through the donation process, surgically recovers donated organs, and transports the organs to recipients. According to Chief Executive Officer Kelly White, more than 100,000 people nationwide are waiting for a lifesaving transplant—3,000 of which are in the nonprofit's Upper Midwest region.

Organ and tissue recoveries are complicated, detailed, and driven by deadlines. The nonprofit works with more than 270 hospitals, 9 transplant centers, 9 medical examiner offices, and hundreds of funeral homes, traveling to those sites when a potential transplant situation arises. As you can imagine, there's a lot of paperwork involved, paperwork that's tracked meticulously, must be easily retrievable, and is regulated by federal authorities. For LifeSource, processing paperwork was painful.

LifeSource was using Sage MAS 90, later named Sage 100, for its finances for years. The nonprofit operated on aging technology housed on-premises. The organization's limited remote access involved trying to connect via a cranky VPN that often dropped connections leaving employees very frustrated while trying to save lives. "We were not able to access data remotely," says Matt Forse, Staff Accountant. "The reporting capabilities were very limited, and the reports that we did have were not formatted very well. The user interface was not very friendly."

"The biggest issue was that our business had grown quite a bit and Sage 100 was no longer able to manage what we needed it to do," says Beth Kabba, Senior Manager of Financial Operations, a 30-year-veteran of LifeSource. "To get a customized report took a lot of work. It was very difficult to use our financial information to make decisions or tell our story." "It took a lot of labor to enter in AR or AP and it was time intensive. It got to the point of not helping us do our work, and made it a lot harder to work," she adds.

Company
LifeSource
www.life-source.org

Industry
Healthcare: Organ, Eyes and Tissue Transport

Number of Employees
Approx. 245 full time employees

Location
Serves Minnesota, North Dakota, South Dakota and western Wisconsin

Products
Acumatica Advanced Edition with:

- Financials
- Consolidation
- Advanced Expense Management
- Monitoring and Automation
- CRM
- Multiple Currencies
- Velixo Reports

Customer Social Sharing Details

www.facebook.com/lifesourcemndak

www.instagram.com/lifesourcemndak

www.twitter.com/LifeSourceMNDAK

www.youtube.com/user/LifeSourceMN

www.linkedin.com/company/lifesourcemndak

Partner Details

Blytheco
www.blytheco.com

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At LifeSource, every financial action is tracked by a patient ID, including procurement costs, organ transport, transplants, doctor pay, and so forth. “We had to merge information, look up items in different spreadsheets, and move information around,” Kabba says. “Nothing could speak to each other. “Nothing was transmitted digitally; every item came in the postal mail. “You’d have to get the mail and stamp it, most likely an invoice, with the date.”

As the years went on, the Sage system began to crawl, and if someone accidentally made a mistake, the whole transaction needed to be re-entered, wasting time. For example, Kabba explains, “It’s not unusual for us to get a transportation invoice once every two weeks that might have 100 lines that represent different case. And so, you had to enter data in for each case.” In addition, executives didn’t have access to financial reports unless she printed the reports for them.

No Remote Access

To get any work done during the pandemic lockdown required trying to VPN into on-premises servers, which was very difficult. They rotated who worked from the organization’s offices. Running a financial report was challenging, requiring someone in the office to run them, save the files, and then send them to the requestor. While providing balance sheets and income statements was somewhat easy, obtaining deeper data and insights into donor data, was very difficult. The organization had eight seat licenses, which meant additional users needed to ask someone to log out or needed to schedule access.

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>
> – Beth Kabba,
> Senior Manager of Financial Operations,
> LifeSource

SOLUTION

Acumatica Advanced Edition

In addition to going paperless and needing a cloud-based system that could be accessed remotely, LifeSource wanted an easy-to-use, intuitive system that offered unlimited user access, Kabba says. The LifeSource evaluation team looked at newer versions of Sage, Microsoft Dynamics, and Oracle NetSuite before choosing Acumatica.

“The team really liked the way Acumatica worked and was laid out, and the user interface,” Kabba says. “Microsoft Dynamics just felt like it was cumbersome for data entry, and NetSuite felt too big, a little bit more than what we needed and certainly the cost was a lot more than a nonprofit that has to watch its pennies could afford.”

“With Acumatica we felt like we were getting everything we wanted at a value that we could afford,” she adds. The LifeSource team also liked that Acumatica offered additional functionality and was flexible, offering an open API that third-party developers could use to seamlessly connect additional applications.

With the help of Acumatica partner Blytheco, which had been a LifeSource technology partner for nearly two decades, they implemented Acumatica. And no one cried, says White. “The support we got from Acumatica and Blytheco was great. We were up and running in no time despite moving 30,000 journal entries that were complex with lots of allocations. Acumatica made our lives easier.” She says that employees, especially the finance team, loved it from day one. They loved that the onboarding process was easy.

BENEFITS

Transformed Operations

With Acumatica, LifeSource transformed its back office, which has increased visibility, efficiency, and automation. Everyone has real-time access to the right information at the right time. Managers approve payments faster thanks to automated notifications and document scanning. Executives and employees access information remotely based on their security clearances and obtain any number of critical reports at the touch of a button. Role-based dashboards allow different team members to instantly access information and critical KPIs appropriate to their jobs.

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Kabba reports LifeSource employees are more efficient thanks to Acumatica's workflows. They've eliminated a lot of manual data entry tasks, replacing them with automation, which resulted in a 40% improvement in efficiency. Because vendors can send invoices electronically and automatically track them, communicating with them is much easier. Little time is spent opening mail and entering information. LifeSource has reduced aged invoices over 90 days by over 50%, Kabba says. "We've saved a lot of time—so much it's hard to quantify."

The management team views past reports and month-in-progress reports in real time, which allows them to track grants more effectively. Executives have greater clarity of information well beyond what they had previously. Rather than bothering the finance team to run reports for them, managers can drill down and look at monthly reports, and if they have questions, drill down into the information, or if they see something is coded wrong, they correct errors themselves if they have proper security clearance.

Employees can upload expense reports with the mobile app, which saves them time and time for the finance department, which previously had to type that information into Sage.

After initially deploying Acumatica, LifeSource integrated expense reporting. They also added Velixo, a popular Acumatica partner specializing in Excel-based reporting and analytics.

Reimagining Operations

Saving time, Kabba says, helps LifeSource operate more efficiently, which in turn allows them to reduce overhead costs and helps them save as many lives as possible. LifeSource has grown into an operation worth $85 million, expanded its footprint, and is reimagining its operations. With Acumatica deployed, LifeSource is able to leverage the flexible platform to support the goal of growing transplant by 40%.

"Acumatica Is continuously innovating so we can do what we do best, which is saving lives," White says. "We needed a robust and reliable solution for our clinical teams. Acumatica was the perfect solution, a flexible solution that will grow with us as our work grows over the upcoming years."

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