



A JMT Consulting & Sage Intacct Migration Milestone

SETTING THE STAGE

Recently celebrating its 45th anniversary, a Michigan-based nonprofit with 40+ employees serves as an advocate for responding to, preventing, and ending domestic and sexual violence. This private organization operates on a yearly budget of just over \$3 million, with most funding and revenue coming from state and federal reimbursement-based grant contracts and local philanthropy.

As it did for most of the world, the Covid pandemic had a major impact on this organization. With people being forced to stay at home, there was an unfortunate increase in occurrences of domestic violence.

 **The demand for our services was incredible,**” said the nonprofit’s executive director. “But we were also fortunate to see an increase in local, state, and federal funding for our emergency services. We were seeing this infusion of cash into our organization – some of which was local and flexible, and some which was very restrictive.”

The rise in caseloads and the influx of additional revenue during this period put a strain on the

organization’s accounting structure.

“I refer to this period as kind of our great unraveling,” said the executive director. “I started to see that our finance team and our operations team were very strong when they were familiar with the sources of revenue, but there wasn’t an ability to be **fluid and adaptable to new sources of revenue or new ways of thinking.**”

THE NEED TO MOVE BEYOND MIP

This nonprofit began working with JMT Consulting over 25 years ago to implement MIP. The stalwart financial software served the organization extremely well, but the changing times put a spotlight on the need to think about migrating to the cloud. The organization returned to JMT, following years of MIP support, to seek our advice on implementing a new accounting solution to better suit its needs.

“**We were server-based MIP users for 25 years,**” said the executive director. “Our accounting staff absolutely loved MIP, and rightfully so. The precision and accuracy that it provided was top notch. But what it didn’t provide was a forecast or an analysis for individuals at my level or the board level.”

“Our organization was extremely siloed,” the executive director added. “The programs and services being driven in were deployed primarily out of our finance department. Program managers had little access to, or influence over, the ways in which our teams were being funded—which then translated into limitations when services were being delivered. We needed to forecast what lies ahead of us as an organization.”

With the organization’s server nearing the end of its lifecycle, and the new era of remote work and cloud-based applications changing the environment, the nonprofit knew it was time for a change.


RE-ENTER JMT AND SAGE INTACCT

Based on the organization’s prior relationship with JMT, the nonprofit partnered with us once again – this time to migrate to Sage Intacct.

“We engaged with JMT to start talking about what we were going to do in terms of better integrating our software, both financially and across other departments,” said the executive director. “The need to integrate time tracking, budgeting, and other applications was also a significant driver.”

“On October 1, which was the start of our fiscal year in 2022, we went live with Sage Intacct implementation,” the executive director continued. “I absolutely love it as a software program and loved being able to go through the training and design of the software with the organization. I have my reports, I have links to our SharePoint files. The attachments or last year’s audit are easily accessible. I can also link right to our bank account or to our time and attendance system – it’s all cloud-based and interactive.”

JMT is the only Sage Intacct partner working exclusively with nonprofits. After careful assessment of the needs of this nonprofit, we realized it could benefit from the streamlined functionality of Sage Intacct. We felt this organization could particularly benefit from Sage Intacct’s integrated grant monitoring and budgeting modules, as well its intuitive dashboards.

 Sage Intacct is much more intuitive,” the executive director added. “The reporting functions and the ability to segment and query information in a way that presents it to varying audiences, particularly our board of directors, allows us to program budgets

and spending year to date. It also helps us cut out unnecessary operating spending.”

Changing accounting systems is a major undertaking for nonprofit organizations and employees who are used to working with tried-and-true software. JMT specializes in migrating organizations to cloud-based solutions like Sage Intacct. Organizations are backed by our 97% success rate, along with our support staff to help educate employees and ease the transition. JMT worked closely with the nonprofit throughout its Sage Intacct migration to make sure all necessary records like grant, contract, and vendor records were seamlessly integrated into the system so they could focus on delivering their mission.

“We really appreciated their external perspective and guidance,” the executive director said. “Our accounting assistant always struggled with MIP; it wasn’t intuitive enough for her. She has completely blossomed as an employee because she went through all the training alongside us. She accesses JMT’s website and watches the webinars. She’s like a completely different employee because she has so much confidence in her day-to-day work. It’s all been a very meaningful transition.”



Cloud-based and interactive



97% implementation success rate



Records seamlessly integrated

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