

Adaptive Insights and Sage Intacct Help Birch Family Services Transform and Align FP&A and Accounting

“Carlson Management Consulting has been an invaluable resource for my team and me over the years. I had such a positive and helpful experience with my first implementation, that I immediately called them when it was time to do my second, third, and fourth implementations.”

—Josh Scher, CFO, Birch Family Services

The Challenge

Birch Family Services initially managed its budgeting and forecasting processes in Excel. The nonprofit organization experienced the usual issues with spreadsheets – manual data entry, formula errors, version control and others. Cognizant of the limitations of Excel, it went through the process of identifying a cloud-based budgeting system that would meet its needs.

In addition, the finance team had been unhappy with their general ledger system both in terms of the way their accounts were set up and the software’s functionality. They also wanted an ERP solution that would readily connect with their new budgeting system.

The Decision

As it became clear that Birch Family Services was better served with best-in-class solutions, Josh and the CIO developed a strategy to move its core finance and accounting processes into the cloud. Josh had implemented Adaptive Insights at his previous job many years ago and was really satisfied with the solution. That’s why when he joined Birch Family Services and saw the shortcomings of the Excel-based budgeting process, he quickly contacted Carlson about his new initiative and desire to replicate his prior success using Adaptive Insights.

The organization also partnered again with Carlson to implement a new cloud-based ERP system. The finance team realized Sage Intacct was the best fit because of its robust feature set for nonprofits and its capability to connect with Adaptive insights via DataBlend, a cloud-based integration platform.

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About Birch Family Services

Birch Family Services is a social services agency with two lines of business. It has more than 3,000 teachers, therapists, social workers, psychologists, nurses, residence counselors, administrators, board members, and family members working together to provide the finest education, habilitation, and residential services to people with autism and other developmental disabilities.

The organization also helps families overcome the lifelong obstacles they face in raising children with disabilities. In addition, it runs services for adults with developmental disabilities in mostly 24/7 residences.

Birch Family Services has 1,000 employees and an annual revenue of about \$68 million dollars.

Find out more about Birch Family Services at their website: www.birchfamilyservices.org

Customer Success Story

www.carlsonmc.com

Carlson helps Birch Family Services Transform and Align FP&A and Accounting

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“The functionality is great, and I like that it can do allocations. Its forecasting capabilities are also very helpful,” stated Josh. “Adaptive Insights is a great product all around. We use Adaptive Insights along with Sage Intacct for pretty much all financial functions, including revenue, expense, planning, and budgeting.”

The Results

For Josh and the finance team at Birch Family Services, the benefits of using Adaptive Insights were two-fold: “With Adaptive Insights, you’re gaining two primary benefits. First, you’re getting back the time you would typically spend doing non-value-added work. Basically, you’re not spending time creating spreadsheets, then checking and rechecking to make sure Excel is right. You’re eliminating all that time, so you can focus on analysis.”

Josh continues, “The second key benefit is you have an accurate forecast at all times. Our budget process used to be between three to five months long and would take 90% of everyone’s time. Since our budget staff has implemented Adaptive Insights, our budget process is two months and requires only about 20% of our time. The platform gives you the time and freedom to focus on other high-priority goals.”

About Carlson Management Consulting

Carlson Management Consulting (Carlson) is an award-winning Cloud financial solutions and services firm, serving a growing list of customers nationwide and internationally. We deliver best in class Cloud solutions for Corporate Performance Management (CPM), Enterprise Resource Planning (ERP), Timesheet and Expense Reporting, Tax Automation and Systems Integration as well as value-added consulting and outsourced services to organizations of all sizes and industries. Carlson has ranked 3 years in a row on the Inc. 5000 list of the fastest growing private companies in the US.



“At this point, I don’t see how any agency can operate without using a cloud-based budgeting and forecasting system. In the nonprofit world, Adaptive Insights has been able to address all my needs and challenges throughout the budget process.”

“With Adaptive Insights, you’re getting an all-encompassing platform where you can manage every aspect and facet of the budget in one piece of software. Because it handles many financial functions for you, you don’t have to spend time on non-value-added work that a lot of people do.”

— Josh Scher

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