

UNITED WAY SERVICES

Solution Overview

Industry

Not-for-profit services agency

Microsoft Business Solutions Partner

ePlains, Inc.
Wheaton, Illinois, USA

Implementation Consulting Provider

Deloitte & Touche
Cleveland, Ohio, USA

Scenario

United Way Services sought to replace their existing mainframe accounting system with a flexible, affordable, easy-to-use system with outstanding reporting capabilities. Microsoft Business Solutions provides United Way Services all those benefits—and more.

Company Profile

United Way Services provides fee-based accounting services—including payroll processing, financial-report generation and vendor payments to partner agencies and other Cleveland-area not-for-profit organizations.

Benefits

Microsoft Business Solutions provides United Way Services with easy access to information, seamless transaction processing and fast year-end processing. The solution helps United Way Services continue to provide affordable, high-quality service to their customers.

Software Used

Microsoft Business Solutions—Great Plains
Financials
Inventory and Order Processing
Customization Tools

Demographic Information

Annual Revenue: \$40 million USD
Number of Employees: 100
Number of Users: 23

Migrated from a mainframe system with custom-developed software

Microsoft Business Solutions is helping United Way Services provide high-quality accounting services to their not-for-profit organization customers.

United Way Services, the largest private-sector funder of health and human services in the greater Cleveland area, provides fee-based accounting services to their partner agencies and other local not-for-profit organizations. The services they provide—which include payroll processing, financial report generation and vendor payments—are vital for those not-for-profit agencies that lack the staff, expertise or systems to handle these duties in-house. “Some of these agencies do not even own an adding machine or computer,” says Linda Petta, United Way Services’ assistant director of finance.

By taking advantage of the services provided by United Way Services, partner agencies can focus on day-to-day activities without worrying about such matters as data accuracy and ordering, signing and even mailing payment checks.

United Way Services has been providing these types of services to other not-for-profit agencies for more than 50 years, and currently handles accounting-related duties for 48 separate agencies and deals with four different fiscal years. In 2001, the organization inputted more than 460,000 transactions and printed more than 40,000 checks.

“A Very Hard Sell”

By the late '90s, decision makers at United Way Services realized the agency would soon need a new financial and accounting solution. Their mainframe system, which made heavy use of custom software and onsite programmers, wasn't Y2K-compliant. What's more, “there was no operating system available to keep the old mainframe going,” Petta says.

At this point, the search for a new business solution began. It had to be flexible, affordable and easy-to-use. Most of all, the new solution would have to provide outstanding reporting capabilities and be able to serve a wide range of customers. “The people we work with range from the receptionist who also does the accounting all the way to CPAs,” Petta says. In implementing a new system, “we didn't want to give our customers culture shock,” she says. Thus, the new system had to provide reports that were not only highly accurate, but also similar in appearance to what customers had previously received.

United Way Services looked at several different software solutions, ultimately choosing Microsoft® Business Solutions—Great Plains®. “We thought [Microsoft Business Solutions] was the best use of our dollars,” Petta says. Despite the choice, she was unsure that Microsoft Business Solutions could provide all the capabilities her old system provided. “I was a very hard sell,” Petta says. “I was convinced there was no software to replace what we had.”

Spreading the Word about Microsoft Business Solutions

Microsoft Business Solutions quickly made a convert out of Petta. “It was the best decision we could have made,” she says. In fact, she's become such a believer that she consistently attends Convergence, the Microsoft Business Solutions annual

"I was convinced that there was no software to replace what we had. Fortunately, working with our partners at Deloitte & Touche, we found Microsoft Business Solutions and it was the best decision we could have made."

Linda Petta
Assistant Director of Finance
United Way Services

customer conference. During the event, she spends time explaining to other Microsoft Business Solutions customers and prospects how to successfully use Microsoft Business Solutions in a not-for-profit, multi-company organization. Petta is also pleased with the way in which the solution works seamlessly with Encore Interfund Management, a third-party product that helps not-for-profit companies easily transfer funds.

In addition, Petta touts the benefits of Microsoft Business Solutions to other United Way agencies, occasionally even hosting software demonstrations. As a result, four other United Way organizations have purchased the product.

Return on Investment

United Way Services' investment in Microsoft Business Solutions is paying off in many ways, including:

- **Easy access to information**—The new solution provides United Way Services access to a wealth of data and information that wasn't available from their old system. Microsoft Business Solutions allows outside customer agencies to run reports and make inquiries online. "Where once only we at United Way Services had access to the accounting system, many of our agencies are now able to access the software remotely," Petta says.
- **Fast, seamless transaction processing**—The Integration Manager allows United Way Services to process transactions far faster than when using their old system. In fact, the system performs so well that United Way Services was recently chosen to distribute a grant to the former employees of a steel manufacturer that went bankrupt, a process that will require them to process and distribute more than 12,000 checks.
- **Simplified year-end processing**—With their old system, United Way Services wasn't able to process multiple year-ends that closed at different times—a capability they now have. In addition, year-end processing now requires one employee, instead of the two previously required.
- **Increased employee productivity**—Before implementing Microsoft Business Solutions, much of United Way Services' staff was engaged in what Petta calls "heads-down data-entry." The new business solution allows staff members to focus on additional, more-productive activities.
- **Simplified audit process**—United Way Services' outside auditor periodically conducts a test of the agency's internal controls and transactions. "Before, we had to create all the audit spreadsheets and detail, which took a lot of time," Petta says. "Now, the auditor comes in, sits down at a PC, enters a view-only user ID and performs the audit onsite. That reduces our audit time substantially."
- **A continued commitment to service**—Most importantly, Microsoft Business Solutions allows United Way Services to continue providing the affordable, high-quality service their customers have relied upon for nearly half a century. "Microsoft Business Solutions allows us to leverage our dollars to provide a state-of-the-art accounting system for our many different agencies that would not otherwise be able to afford this software solution," Petta says.

For more information about Microsoft Business Solutions, visit www.microsoft.com/BusinessSolutions

© 2002 Microsoft Corp. All rights reserved. Microsoft and Great Plains are either registered trademarks or trademarks of Microsoft Corporation or Great Plains Software, Inc., in the United States and/or other countries. Great Plains Software, Inc. is a wholly-owned subsidiary of Microsoft Corporation. The names of actual companies and products mentioned herein may be the trademarks of their respective owners.

