

CASE STUDY



Family Equality Maximizes Its Impact With Real-Time Financial Insights

Customer Profile

Family Equality advances legal and lived equality for LGBTQ+ families and those who wish to form them, through building community, changing hearts and minds, and driving policy change. When it outgrew its homegrown systems and processes, the nonprofit turned to Armanino for help migrating from QuickBooks to Sage Intacct and to redeploy Salesforce for streamlined donor management.

Benefits

- Saves one week of staff time per quarter creating financial reports for the board
- Automated the budget process and gave budget leaders access to real-time spending data
- Eliminated double data entry for key processes to free up staff time

Services



Salesforce
Re-Implementation



Sage Intacct
Armanino
Consulting &
Implementation
Services

Challenge

Family Equality is a 501(c)(3) nonprofit organization based in New York City. The organization's mission is to advance legal and lived equality for LGBTQ+ families and those who wish to form them, through building community, changing hearts and minds, and driving policy change.

Created in the 1980s, Family Equality began as an informal grouping of like-minded people volunteering their time and skills. Over time, as the organization grew organically and began hiring paid staff, it adopted systems such as Microsoft Excel and then QuickBooks to help it track and handle its finances.

When Michel DuBois joined the organization as chief financial officer, it was clear that Family Equality had outgrown its basic accounting software as well as its mostly manual processes outside of the financial system. "QuickBooks is fine for small organizations that are not very complex," says DuBois. "However, as we began to look at diversifying funding and program offerings, the limitations within QuickBooks grew too significant for us to work around."

Homegrown solutions for processes such as timesheet tracking, expense reimbursement, budgeting and other core capabilities also created inefficiencies that took up far too much time for the nonprofit's staff. "We needed a consolidated financial management solution that would eliminate redundant data entry across disparate systems and processes," says DuBois. "More importantly, we needed a solution that would support us in fund accounting, analyze our financial well-being, streamline and improve budgeting, and stay on top of financial data in real time."

Solution

After vetting several other solutions, Family Equality chose Sage Intacct, a cloud-based financial management system, for its robust set of out-of-the-box capabilities that would enable the nonprofit to consolidate and automate its processes, including an integration with their existing Salesforce solution. Based on a recommendation from Sage Intacct, Family Equality selected Armanino LLP as its implementation partner. One of the 25 largest independent accounting and consulting firms in the U.S., Armanino is an end-to-end Sage Intacct implementation, integration, customization and consulting provider.

WHAT THEY'RE SAYING

“With Sage Intacct, we can press a button to move results from the dashboard to reports. It has revolutionized our reporting, saving at least a week of staff time each quarter.

Michel DuBois CFO,
Family Equality

As the deployment project kicked off, DuBois had three major goals he wanted the team to achieve:

- Migrate all historical financial data from QuickBooks to Sage Intacct
- Ensure the financial data in Sage Intacct is utterly accurate
- Launch the new system on time, with no delays

Thanks to the knowledge, skills, and experience of the Armanino team, Family Equality achieved all of DuBois's goals. "It was amazing not to have to worry about the success of this project," says DuBois. "Thanks to Armanino's expertise, management and proven processes, our implementation was completely flawless."

Given the finance team's extremely positive experience with Armanino for the Sage Intacct implementation, DuBois recommended Armanino to the development team within Family Equality to help it re-structure its somewhat faltering Salesforce implementation from several years prior. The development team worked with Armanino to successfully redeploy Salesforce and prepare it for integrating with Sage Intacct, a project also delivered on time and flawlessly.

Results

Among the many benefits the nonprofit has already experienced since moving to Sage Intacct, access to real-time financial data, the ease and flexibility of reporting, process efficiencies, and improved budgeting are the ones most top-of-mind for DuBois.

"For a nonprofit of our size to provide live financial data based on role to those who need it in the organization is so rare most folks need coaching to understand the down-line positive impacts on overall culture resulting from shared financial fluency within the organization," says DuBois. "What we can achieve with Sage Intacct is amazing. My colleagues around the country are jealous when I tell them that we can provide a dashboard to a program leader that shows them live spending data, another dashboard to the CEO showing her trends in our overall financial position, and yet another dashboard to the treasurer showing them other role-appropriate KPIs — all including exportable graphs and dynamically generated using real-time data."

Much of the reporting DuBois's team handled was manual in the past, especially the unique management reports provided to the board. "With Sage Intacct, we now press a button to move results from the dashboard to the PowerPoint slides," says DuBois. "It has revolutionized our reporting, saving us at least 40 hours of staff time each quarter."

WHAT THEY'RE SAYING

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Michel DuBois CFO,
Family Equality

Budgeting is another core area that is now automated for the nonprofit. “With Sage Intacct, we now have a sophisticated budgeting process, with everything consolidated automatically as we update the budget weekly,” says DuBois. “Each of our budget leaders can see the current management budget with best projections for revenue and expenses. Access to up-to-date information gives them the ability to make informed decisions about shifting funds within their budget based on actual data.”

Eliminating double data entry for processes such as expense reports and timesheet tracking saves Family Equality a significant amount of time and effort, both within the financial operations team and across the organization. “The automation and process efficiencies we’ve seen from implementing Sage Intacct mean that our staff spends less time on managing the nuts and bolts and more time focusing on the work we’re here to do to fulfill our organization’s mission,” says DuBois.

Next Steps

While the COVID-19 pandemic has caused the nonprofit to put certain projects — including the Salesforce and Sage Intacct integration — on hold temporarily, Family Equality is looking forward to the significant benefits it expects to see from the project in the future. “The integration will reduce reconciliation efforts and enable us to shift the reliance on the finance team for funding analytics to the development team,” says DuBois. “And I know that with Armanino leading the effort, I won’t have to worry about the project being completed flawlessly, on time.”

In the meantime, the finance team is looking forward to making deeper use of Sage Intacct. “Using dimensions in Sage Intacct gives us far more freedom in how we can look at our data,” says DuBois. “We’ve only begun to scratch the surface of the statistical aspects of Sage Intacct. We’re looking forward to scaling and growing our financial analysis capabilities.”

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