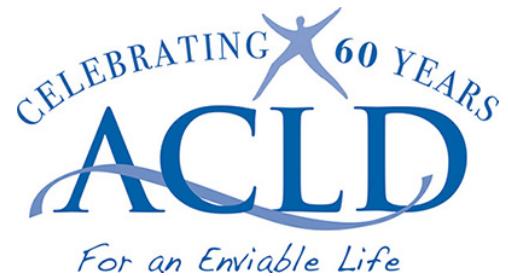




Nonprofit ACLD Moves to 100% Paperless Procurement, Purchasing and Invoicing With **Coupa** Case Study



At A Glance

Customer Profile:

Adults and Children with Learning and Developmental Disabilities (ACLD) provides opportunities for children and adults with autism and learning and developmental disabilities. Moving from a paper-based to a 100 percent electronic workflow helped ACLD streamline its requisition and purchasing processes while gaining visibility and control of spend across the \$65 million agency.

Software & Services

- Coupa
- Armanino integration and implementation services

Benefits

- Replaces paper-based, time-consuming workflow with a self-service, electronic requisition-to-purchase-order process
- Provides spend visibility and control across departments
- Integrates in real time with Microsoft Dynamics GP

Modules

- Armanino integration Pack (Coupa to Microsoft Dynamics GP)

Challenge

Since 1957, Adults and Children with Learning and Developmental Disabilities, Inc. (ACLD) has supported the pursuit of an enviable life for people with autism, learning and developmental disabilities. Founded by a group of families, the nonprofit agency provides services and support to children as young as 3, and continues supporting men and women, and their families, throughout their lifespan. A \$65 million organization, ACLD employs more than 1,100 staff members across more than 80 program sites in Nassau and Suffolk counties in New York.

Over the years, as ACLD significantly expanded its service and program offerings across its three different organizations (ACLD, the Charles Evans Center and the ACLD Foundation), its paper-based system for procurement and accounts payable could no longer keep up. “Purchase requisitions often traveled by interoffice mail, and color-coded purchase orders were either emailed or mailed to vendors,” explains Gerard DiMuro, director of purchasing for ACLD. The vendors, in turn, usually sent invoices in hard-copy form.

“Because it was paper based, our system was very labor intensive,” says DiMuro. He knew that ACLD needed to automate and streamline its processes to improve efficiency and visibility into sourcing and purchasing activities. Thus began the search for a new spend management system.

Solution

After evaluating solutions from a dozen different vendors, ACLD chose Coupa—a cloud-based spend management platform—for its ease of use, robust set of capabilities and ability to integrate with Microsoft Dynamics GP, the agency’s accounting software.

Another deciding factor for Coupa was its recommended partner for implementation: Armanino, an independent accounting and consulting firm and one of the biggest Microsoft Dynamics partners in the United States. “Armanino clearly had the expertise and proven success in not only implementing Coupa, but integrating it with Microsoft Dynamics GP,” says DiMuro. “That had a huge influence on our decision for both Coupa and Armanino.”

Once the decision was made, Armanino deployed the new procure-to-pay (P2P) and cloud spend management platform for ACLD, staying on time and budget for the 12-week implementation project. The Armanino team also worked with ACLD to implement new business processes and manage change throughout the organization.

Because integration with Dynamics GP was a top priority for ACLD, Armanino tackled that part of the project early in the deployment process. Using Armanino’s Integration Pack, the integration allows account, supplier, invoice and payment information to flow seamlessly and in real time between the two platforms. “We didn’t want a flat-file integration

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Director of Purchasing,
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where data isn't updated for hours or days," DiMuro says. "That's why having real-time integration was a major requirement for us."

Results

Coupa's intuitive interface meant ramp-up time was minimal for using the new system. "I've project-managed quite a few system implementations during my career, but this was one of the easiest deployments I've ever experienced," says DiMuro. After just one hour of training, ACLD users were successfully completing requisitions and purchase orders electronically. "We decided not to phase it in gradually," adds DiMuro. "On day one, our requisition process immediately became 100 percent paperless. Every location, every building, every program became paperless."

ACLD is already seeing tremendous efficiency gains and time savings. For instance, punch-out catalogs allow users to follow a link from Coupa to a supplier's ecommerce website, and then submit the requisition directly through Coupa. Instead of entering everything by hand, the system automatically pulls in an item's cost and details from the supplier's website. Now, 50 percent of ACLD's purchase orders are completed through punch-outs and catalogs. "This is a tremendous improvement because in the past, there were no catalogs," DiMuro says. "The requisition-to-PO process is now moving toward self-service, with minimal intervention from the purchasing team."

The agency is also seeing success with vendor invoices being sent electronically and processed automatically without needing to go to accounts payable. Invoices that are associated with purchase orders go to the finance department for a quick review before automatically flowing into Microsoft Dynamics GP for payment.

ACLD's next priority is increasing the number of purchase order-backed invoices to 50 percent from its current 10 percent of spend under management. "We want to move the process into the procurement area so that we can be more strategic about how we set up contracts and better manage spend," says DiMuro.

As DiMuro and his team continue to use Coupa to improve efficiency and control of the purchase process across the agency, he's confident that ACLD has the right partner in Armanino to help the agency become a leader in spend visibility. Explains DiMuro, "With help from Coupa and Armanino, ACLD is moving very quickly from a laggard to a leader in spend management."

About Armanino^{LLP}

Armanino provides an integrated set of accounting services—audit, tax, consulting and technology solutions—to a wide range of organizations operating both in the U.S. and globally. You can count on Armanino to think strategically, to provide the sound insights that lead to positive action. We address not just your compliance issues, but your underlying business challenges, as well—assessing opportunities, weighing risks, and exploring the practical implications of both your short- and long-term decisions. When you work with us, we give you options that are fully aligned with your business strategy. If you need to do more with less, we will implement the technology to automate your business processes. If it's financial, we can show you proven benchmarks and best practices that can add value company-wide. If the issue is operational, we'll consult with your people about workflow efficiencies. If it's compliance, we'll ensure you meet the requirements and proactively plan to take full advantage of the changes at hand. At every stage in your company's lifecycle, we'll help you find the right balance of people, processes, and technology.