



Foundation Scales Its Operations and Impact With Sage Intacct and Salesforce

CASE STUDY

armanino 

At A Glance

Customer Profile:

The mission of the Armanino Foundation is to assist charitable organizations that create a positive impact on the lives of people in its communities. While the foundation deployed Sage Intacct at its inception to manage its financials, it initially used spreadsheets to track donor information. Manual record keeping soon became overwhelming, and the foundation chose the Salesforce Nonprofit Success Pack to automate donations, campaigns and volunteer tracking. The Armanino consulting team implemented the solution and integrated it with Sage Intacct.

Software & Services

- Sage Intacct
- Salesforce Nonprofit Success Pack
- Armanino Outsourced Finance & Accounting (OFA) services
- Armanino consulting, implementation, and integration services

Benefits

- Automates record keeping for donations and volunteering
- Frees up time to focus on the nonprofit's goals
- Gives real-time visibility into key performance indicators

Challenge

One of the 25 largest independent accounting and business consulting firms in the United States, Armanino LLP is a nationwide leader in serving privately held companies, nonprofit organizations and public entities. From its beginnings, the firm has also fostered a culture of supporting charitable organizations with donations of money and volunteerism.

This passion for giving back to the community was the driving force behind the creation of the Armanino Foundation, which gives the firm, staff and partners, as well as clients, vendors and friends of the firm, a formal structure for community giving.

“We had reached a critical mass with our charitable giving and wanted to better empower everyone at Armanino to follow their passions in community service, charitable donations and leadership,” says Mary Tressel, board chair for the Armanino Foundation, a 501(c)3 charitable organization. “Since founding the Armanino Foundation in 2016, we have raised more than \$500,000 and shared it through grants and volunteering with more than 100 charitable organizations.”

But with the immediate success and increased visibility of the organization came growing pains. “While we had chosen to use Sage Intacct as our financial system of record and worked with Armanino’s Outsourced Finance and Accounting experts from the start, we originally managed donor information using spreadsheets,” says Tressel. “As our payment options and campaigns expanded, manual record keeping quickly became overwhelming.”

The nonprofit hadn’t expected the volume of donations to escalate as quickly as it did, but events such as Hurricanes Harvey and Maria resulted in a rapid ramp-up of campaigns and giving. As a result, Tressel found herself coming into the office early and working weekends to process donations, thank donors and manage grant payments.

Solution

Based on guidance from the Armanino consulting team, which has helped hundreds of nonprofits select and implement the right technology for their needs, the Armanino Foundation chose a customer relationship management (CRM) solution to automate donation management.

“Salesforce Nonprofit Success Pack was the right choice for us for many reasons,” says Tressel. “Not least of which is that the first 10 software licenses are free.”

In less than two months’ time, the Armanino consulting team implemented the Salesforce solution. The team loaded historical donation, volunteer and campaign data into the new CRM and created year-over-year reports and dashboards. Following the deployment, the Armanino consulting team began the integration of Salesforce with Sage Intacct.

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Results

With its new CRM system in place, the Armanino Foundation has full visibility into donations, campaigns and volunteer hours, and can create and run reports in a fraction of the time it took to handle them manually. By automating the thank-you note process, Salesforce reduced that year-end effort from two full work days down to a matter of minutes. And because the thank-you notes include an automatically generated year-end summary of both volunteer hours and donations, they prompt employees to further increase their giving.

“With Salesforce, the stress of manually keeping everything up to date and worrying about the accuracy of tracking donations is gone,” says Tressel. “It’s been a game changer for us. I only wish we had implemented it at the start instead of waiting.”

Now Tressel has more time to focus on helping the nonprofit achieve its charitable goals. “We’ve grown participation in our Volunteer Vacations program and are starting a fund drive for an endowment for the future,” she says. The reports in Salesforce show Tressel and the team the success of each campaign.

To further track performance against its goals, the Armanino Foundation relies on custom dashboards in Sage Intacct. “Our dashboards help us quickly visualize where we are with respect to meeting our goals and to act on any variances we might see,” says Tressel. “In fact, our custom-developed dashboard is now a model for other Armanino nonprofit clients.”

Next Steps

Looking further down the road, Tressel has several new technology projects planned. The first project is to take advantage of the calendaring capabilities in Salesforce to handle signups for programs such as Volunteer Vacations. Later, Tressel envisions implementing the grants module in the Salesforce system to automate tracking of the grant process — from submission through grant payments.

Of course, Tressel will continue relying on the Armanino team for guidance and help along the way, including Armanino’s Outsourced Finance and Accounting practice. “Since its inception, the Armanino Foundation has benefitted from the experience and expertise of the entire Armanino company, from audit and tax to legal guidance, outsourced financial and accounting services, and technology consulting,” she says.

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 US 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.