Success Story

Sage Intacct becomes the ideal “how” for the “Y”

The YMCA of Monroe County drives financial efficiencies and best practices while preserving resources.



About The YMCA of Monroe Country
At the Y, strengthening community is the cause. Through group exercise classes, youth programs, swim lessons, adult health programs, and more, the organization aims to build a healthier Monroe County. Every day, it works side-by-side with its neighbors to make sure everyone, regardless of age, income, or background, has the opportunity to learn, grow, and thrive.

Executive summary
A long-time user of Sage 100, the YMCA of Monroe County faced new requirement mandates its existing software could not support. Sage Intacct is the ideal platform to future-proof the YMCA’s financial operations. Scalable, flexible workflows keep staff working smarter, not harder.

Results with Sage Intacct
- Saving staff hours in the accounting department.
- Monthly close takes just two days.
- One-click integration with member management software.
- Managers gained secure, self-service access to budget reports.
- Eliminated paper-based processes.

Company
YMCA of Monroe County

Location
Indiana, US

Industry
Nonprofit

Sage Product
Sage Intacct

Sage

Sage Intacct becomes the "how" for the "Y"
The YMCA of Monroe County is one of Indiana's many treasures. The thriving organization has three locations and over 10,000 members. The YMCA rarely sleeps — its facilities are open 15 hours a day, seven days a week — serving the community with dozens of programs, activities, classes, and camps. As part of one of the most venerable nonprofit organizations in the country, the YMCA in Monroe County, Indiana understands that to continue carrying the torch, it must future-proof its technology to allow it to thrive for years to come. For The YMCA of Monroe County, Sage Intacct is that future-proof solution.

Accelerated 10 years in 12 months
"We've known for years we needed to migrate from Sage 100 to a modern, cloud-based financial management application, but as a nonprofit, we tend to hold things together as long as possible," says Shannon Kane, YMCA's CFO.

The YMCA's Sage business partner asked Shannon and her team to identify goals for the migration. Eliminating paper processes and incorporating automated workflows that didn't require manual touchpoints were high on the list. Shannon also included better, faster reporting and easier data sharing among the organization's goals. "All our goals were achieved within that time period," she notes. "It's not an exaggeration to say we accelerated 10 years in 12 months.

Automating workflows
As evidence of the organization's digital transformation, Shannon describes how Sage Intacct helped the YMCA completely modernize accounts payable payment processing. "Previously, all four of our accounting staff members were required to be 'in their chairs' at the same time in order to process and complete a check run. Now, the application's automated workflows and remote access capabilities mean each staff person can complete their steps from anywhere, at any time. Ultimately, after the CFO approves the payments, checks are printed with an electronic signature."

Employee credit card processing used to be another manual, paper-intensive process — now transformed by Sage Intacct. "Our employees can quickly enter expense reports in Sage Intacct, dragging and dropping receipt files to attach them," recounts Shannon. "We've configured the approval workflow so the report is automatically routed and once approved it's ready to pay. No paper, no headaches, and no delays."

Democratizing data
Reporting was also an ongoing challenge for the YMCA, occupying much of Shannon and her team's time. "Reports took several long minutes to generate," Shannon notes. "And the way we had to structure permissions in the software meant many managers had to come to me to print the budget reports they needed. It was inefficient for everyone. With Sage Intacct, we can provide secure, role-appropriate access to anyone in the organization who needs it. Managers can now access and print their own budget reports — and they can do it from anywhere."

Integrations extend value
Sage Intacct is built to support easy integrations with other business applications. The YMCA implemented a new member management application last year — before Sage Intacct was in place. "We had three full pages of instructions to follow in order to import the data into Sage 100," recalls Shannon. "With Sage Intacct, we import the data in one click. Literally — from three pages to one click."

Saving cost of staff hours
By automating manual processes and streamlining workflows, The YMCA has been able to reduce the burden on its accounting department and allow employees who wanted to work part-time to do so. "We used to have a larger accounting team," explains Shannon. "I'm now the only full-time staff member. Our team is able to work smarter, more efficiently, and we're more focused and flexible."

Future-proofing the YMCA
Shannon says the YMCA simply couldn't have accomplished what is has, were it not for Sage Intacct. "Sage Intacct is definitely a good investment for The YMCA of Monroe County. The staff salary savings and rapid monthly close helped us justify the cost. But even more importantly, Sage Intacct has prepared us for the future. Business demands flexibility. We simply could not sustain our financial operations without Sage Intacct, because the world is different."

"We were definitely one of the organizations whose digital transformation accelerated 10 years as a result of the pandemic. Sage Intacct was key to this progress."

Shannon Kane
CFO, The YMCA of Monroe County

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