

Success Story

30% boost in finance productivity supports sustainable expansion

UNITE HERE HEALTH

“Sage Intacct’s rich reporting and automation allowed UNITE HERE HEALTH to realize significant hard and soft cost savings and help us scale efficiently with the business. By putting the cloud financial management software at the heart of our best-in-class ecosystem, we’re seeing tremendous ROI and getting back weeks of productivity every year.”

Bryan Schmidt

Controller, UNITE HERE HEALTH



Company overview

UNITE HERE HEALTH is a national, multi-employer, Taft-Hartley ERISA Fund that provides health benefits to eligible union members in the hospitality and gaming industry. For decades, the nonprofit organization has provided benefits and programs designed to meet the triple aim of better care, better health, and lower costs while empowering participants to better manage their health and healthcare.

Results with Sage Intacct

- Increased finance team productivity by 30%.
- Shifted 40% more time into strategic planning and process improvement.
- Accelerated monthly close by 40% and annual budgeting cycle by 30%.
- Gained timely visibility into performance across 40+ departments, plan units, etc.
- Redeployed current staff to more productive tasks.

Company
UNITE HERE HEALTH

Location
Illinois, US

Industry
Nonprofit

Sage Products
Sage Intacct

UNITE HERE
HEALTH

Sage



Thanks to Sage Intacct's modern financial management system, UHH has effortlessly scaled.

Scaling a complex nonprofit amidst 50% growth

As a national health benefits provider, UNITE HERE HEALTH's (UHH) mission is to ensure high quality, affordable healthcare for union workers in the hospitality, food service, and gaming industries. UHH has grown 50% over the past five years through mergers with additional TaftHartley Funds across Nevada, New Jersey, New York, Illinois, Alaska, and Massachusetts. With this expansion came more members, as well as individual reporting requirements for each regional plan unit.

When the organization's on-premises accounting system was discontinued, its finance team went in search of a solution that could mitigate this complexity, minimize duplicate data entry, and meet UHH's long-term, mission-critical needs. "After comparing Oracle NetSuite, Microsoft Dynamics GP, Sage Intacct, and Infor, we learned that Sage Intacct was by far the most focused on the fundamentals of accounting and financial reporting," said Bryan Schmidt, Controller at UHH. "Sage Intacct's strategy aligned with UHH's core values to provide online, real time financial insight surrounded by qualified partners and the ability to deliver substantial innovations every quarter," said Bryan.

Thanks to the Sage Intacct modern financial management system, UHH has effortlessly scaled as transaction volumes have doubled since 2014 and the number of entities has increased from three to nine in under ten years. The team's improved efficiency helped speed their monthly close by 40%. UHH is now well-prepared to handle increased volumes and enjoys real-time, granular financial visibility across all of its independent plan units, projects, and departments—empowering managers to quickly respond to changing business dynamics.

Best-in-class financial software stack allowed for significant hard and soft cost savings

Working with consultants from RKL eSolutions, UHH selected and implemented both Sage Intacct cloud financial management software and new budgeting and planning software from Adaptive Insights in 2014. "RKL provides exactly the support we need by serving as subject-matter experts on both systems. Their input on best practices helped us replace several Excel-based tasks and slash our budget cycle by 30%," noted Bryan.

The finance team also integrated Sage Intacct with Yooz for accounts payable automation, Concur for travel management, FloQast for monthly close tracking, BNA for fixed assets, Fastpath for internal control enhancements, US Bank for cash deposits and reconciliation, and Alteryx for Excel data analytics workflows. Streamlined processes across this best-in-class technology stack accelerated the financial close cycle by 40%, allowing UHH to realize significant hard and soft cost savings.

"These savings now allow me to reallocate my time to projects closer to 50%. We've also improved team morale because people no longer spend their time on mundane tasks, and enjoy the flexibility of working from anywhere due to cloud based systems," said Bryan.



Intuitive financial dashboards deliver vital insight

Because it used to be incredibly time consuming for the UHH finance team to compile, format, and deliver reports to stakeholders across the fund every month, decision-makers were often working with data that was several weeks old. Now, with dozens of custom dashboards set up in Sage Intacct, any manager can check their department's financials and drill down to individual transactions to make informed decisions in real time.

Sage Intacct captures the business context of these transactions, so leadership can filter and analyze business performance by various dimensions. For example, the organization can track eligibility rates and cost per member more easily and view monthly income statements for each independent plan unit, department, location, or projects more quickly. "At UHH, we want to achieve smart growth, and it's critical for regional directors to analyze precise, real-time financials so they can develop strategies to keep their respective plan units financially healthy," said Bryan. "Sage Intacct gives them the visibility they need to better predict a plan's surplus or deficit. All plan units are reported each month with their level of surplus or deficit," stated Bryan.

In addition, the team can customize reports as requested and present actual income and expenses in Sage Intacct alongside budgeted figures from Adaptive Insights. "With our previous system, my staff would have to spend about 30 days each year reconciling differences to figure out accurate numbers for reporting or ad hoc questions," remembers Bryan. "Now, we hit a button in Sage Intacct and it's done, which means that reports are delivered much faster, and everyone appreciates the greater transparency," said Bryan.



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