

## Success Story

# Canine Companions® frees \$500,000 in annual expenses

## Canine Companions

“To see where the company was five years ago and how it’s performing now with modern automation and insight has been very gratifying. Sage Intacct made it very easy to absorb our rapid growth in transactions, and we did it efficiently while maintaining internal controls. We’re now realizing economies of scale.”

### Jack Peirce

CFO, Canine Companions

### Company overview

Canine Companions is a human services nonprofit organization that provides service dogs to adults, children, and veterans with disabilities, as well as facility dogs to professionals working in healthcare, criminal justice, and educational settings. Since its founding in 1975, the organization has placed over 7,000 dogs at no cost, helping clients live with greater independence.



### Executive summary

Previous software:

- Tyler Technologies MUNIS

### Results with Sage Intacct

- Efficiently scaled finance operations amid 2.4x growth in net assets
- Saved \$500k annually through better visibility into expenses
- Freed 50% of time spent on gift processing
- Shortened audit process by 25% and reduced audit cost by 20-25%
- Improved fundraising events' ROI by 10%
- Expanded ability to pursue more complicated grant funding

Sage

**Company**  
Canine Companions

**Location**  
California, US

**Industry**  
Nonprofit

**Sage Products**  
Sage Intacct





### **Modern financial management for complex operations**

Founded in 1975, Canine Companions' mission is to train and place service dogs with individuals with disabilities. The nonprofit's diverse operations span breeding, training, veterinary care, participant housing, and placement at six locations across the U.S. — all funded through donations and grants.

A few years ago, the growing organization relied on outdated on-premises accounting software that was cumbersome and inefficient. Because of this, its finance team managed around 70% of their work manually in Excel. The old system also limited financial visibility to regional-specific views, which made it difficult to monitor functional, departmental, project, or fundraising operations across multiple locations. As Canine Companions prepared for expansion, its leadership decided to embark on a total IT overhaul.

The finance team took the lead, closely evaluating the top cloud-based financial management solutions in the market: Sage Intacct and Oracle NetSuite. They ultimately chose Sage Intacct for its ability to handle the organization's complexity, growth, and integration requirements, along with any future needs. With the new solution, Canine Companions was able to scale its finance operations to keep pace with the nonprofit's 2.4x growth while at the same time processing receivables 50% faster and was a key factor in reducing costs by half a million dollars.



Sage Intacct automated workflow easily cut the labor and time Canine Companions spend by at least half.

### **Efficiency helps finance team scale amid 2x growth**

After working with Sage Intacct implementation partner Armanino to deploy the new system, the Canine Companions finance team saw quick results. Sage Intacct helped automate their end-to-end financial processes, including donation receivables, restricted asset schedules, and purchasing approval workflows, which are now 40% faster with improved accuracy.

By connecting Sage Intacct with the organization's Salesforce-based donor database, the finance team gained timely visibility into fundraising cash flow. Jack Peirce, Canine Companions' CFO, explained, "We used to spend weeks or months tracking and processing gifts in disconnected systems. Now, the marketing team simply configures a fundraising website, the website feeds event transactions directly into the CRM system, and we pull those right into Sage Intacct. This automated workflow easily cut the labor and time we spend on this process down by at least half."

In addition, the Sage Intacct multi-dimensional chart of accounts eased financial and managerial reporting, speeding report preparation by 10 to 15 hours each month. For instance, by applying project tags to transactions, the finance team can now track dozens of restricted gifts right in the system, rather than manually on spreadsheets. With department tagging, they can also produce real-time functional reports at any time, instead of waiting until year's end taking only minutes to produce and allowing for budget managers to produce themselves. "Before, the departments existed in concept, but we had no way to separate out their financials in the system," Jack noted. "Sage Intacct has made the statement of functional expenses come alive," said Jack.

With modern processes in place, Canine Companions successfully scaled operations with reduced finance headcount. Even as project volumes doubled and net assets grew from \$64 million to \$144 million, finance absorbed the data management team and took on added responsibility for fundraising data and facilities capital project budgeting. The finance team has saved more than \$100,000 in personnel costs through more efficient production.



### Visibility opens up new funding opportunities

With real-time, granular financial visibility, the organization developed greater functional expertise and budget accuracy in key areas like fundraising, marketing, and programs. “The insights we have in Sage Intacct really help our planning by improving everyone’s understanding of budgets, operations, and financial impact,” Jack said. “Regional program directors never felt as connected to the goals and budgeting process before. But now, they can view relevant financial data by department, function, and type of expense, and they’re able to make much better decisions,” said Jack.

In particular, Canine Companions benefits from improved transparency around direct program expenses, like dog food, as well as personnel benefits costs and telecommunications. Jack shared, “With more visibility into expenses, Sage Intacct helped us eliminate half a million dollars in expenses.” Better, more timely information also helped the non profit boost the ROI of its fundraising events by 10%. “We can see how solicited individuals donated and track fundraising metrics across both individual and corporate donations,” said Jack.

With more sophisticated reporting, the organization is applying for new grant funding that was previously out of reach. Steve Polinski, Controller at Canine Companions, said, “We’re starting to reach out to more foundations to

get specific grants. We can pull broad expense categories — like puppy raising, breeding, or training — very quickly, which allows us to go after more complicated awards.” Jack added, “Our development team is no longer afraid of restricted funds or pledges. They know we can account for them and administer them effectively, so they’ll have the information they need to steward those donors,” said Jack.

Not only does this visibility help when pursuing new grants, it improves the organization’s annual audit cycle. “Having a more sophisticated financial solution reduces the back-and-forth during audits,” commented Steve. “We simply give a read-only seat to our auditors, and they can poke around the system to look at backup for transactions themselves. This easily makes our audits 25% faster,” said Steve. Based on proposals from new auditors, Jack expects these efficiencies to deliver 20-25% audit cost savings next year.

Across Canine Companions, the perception of finance shifted toward one of collaboration and empowerment, rather than top-down decision-making. This freed up 20% of the CFO’s and Controller’s time from dealing with ad hoc internal requests. “It wasn’t until we put Sage Intacct in place that we could fully realize our vision for finance transformation. Today, everything is transparent, the organization has confidence in our financial statements, and we have more time for strategic thinking,” Jack concluded.



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