

Sage 300 ERP yields bottom-line results for People Corporation

Purpose-built tool speeds and improves budget process



Customer

People Corporation

Industry

Corporate benefits provider

Headquarters

Winnipeg, Manitoba

Number of employees

100

System

Sage 300 ERP

Sage Budgeting and Planning

People Corporation is in the people business. Based in Winnipeg, Manitoba, the company is a provider of group benefits, group retirement, and human resource services. A publicly traded company, People Corporation has enjoyed significant growth through acquisitions, moving it from a regional firm to one with a national presence. In 2013, the company made the PROFIT 500 listing of Canada's Fastest-Growing Companies.

With multiple entities and departments to track, budgeting and planning become of crucial importance. People Corporation relies on Sage 300 ERP* and Sage Budgeting and Planning to drive efficiency, encourage collaboration, and better tie its budgeting activities to actual results.

Spreadsheets prove inadequate

The company has relied on the financial and accounting modules of Sage 300 ERP for many years, adding

the Sage Budgeting and Planning component recently as it sought to improve its overall budgeting and planning process.

"We were juggling more than 25 separate budgets using spreadsheets," recalls Clint Kehler, senior financial analyst for People Corporation. "Spreadsheets worked well enough when we were smaller, but as we grew, it became clear we needed more a more powerful tool. We had to bring our GL data over manually, and much of our work had to be duplicated each year and for each entity."

With many people involved over an expanded period of time, the company was experiencing problems with version control. It was sometimes difficult to identify which version of the budget was the current version, and tracking who was working on what iteration was always difficult.

*Sage 300 ERP was named Sage ERP Accpac when People Corporation initially implemented this solution. The product names have been updated in this case study to reflect current naming.

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Clint Kehler, senior financial analyst
People Corporation

Challenge

As People Corporation grew into a national entity, its system of budgeting and planning using spreadsheets proved inadequate.

Solution

Sage 300 ERP with Sage Budgeting and Planning provide a comprehensive, purpose-built solution to budgeting and planning.

Results

Real-time visibility into the budget process aids management in better decision making. Version control and user security ensure the right individuals are working on the current version of the correct budget. More accurate forecasting helps the company identify and then react to trends and patterns. What-if analyses provide the ability to see the impact of potential changes and adjustments to a budget.

“Forecasting helps us to identify trends and patterns in the business, which makes our planning and decision making more fact-based and accurate.”

Clint Kehler, senior financial analyst
People Corporation

“In addition, our management team wanted real-time visibility in the budget cycle and spreadsheets just couldn’t provide that,” Kehler adds.

Ready for a purpose-built solution

Kehler spoke with the company’s Sage business partner who recommended the Sage Budgeting and Planning solution. “They showed us how it could improve and shorten our budget cycle,” he says. “It integrates automatically with our general ledger data and is highly flexible and configurable to fit our processes.”

Improved budget process

The support for what-if analysis is of particular benefit to People Corporation. “We can instantly see what impact a 10 percent increase or decrease in revenues will have,” says Kehler. Other uses for the what-if scenarios are reorganization and consolidation considerations.

More accurate forecasting is also proving to be enormously beneficial to the organization. “Forecasting helps us to identify trends and patterns in the business, which makes our planning and decision making more fact-based and useful,” add Kehler.

Built in security and version control

In an organization where budgeting and planning functions are distributed across departments and locations, security and version control of the budgets become vital.

Sage Budgeting and Planning provides a single database for the collection, organization, manipulation, and management of the company’s budget data.

Management now has real-time access to the data needed to better guide the company. Plan Sheets, with a familiar spreadsheet look and feel, are sent to the division and department managers to facilitate their input into the budget process.

Robust security settings enable People Corporation to limit the ability to view or edit information to authorized users, and email notifications ensure the time-sensitive process keeps moving.

Smart and cost effective

Sage 300 ERP with Sage Budgeting and Planning is proving to be a smart and cost effective way for People Corporation to manage its complex budget process. “It helps turn a tedious process into an efficient and painless one,” concludes Kehler.

About The Sage Group plc

We provide small and medium-sized organizations with a range of easy-to-use, secure, and efficient business management software and services— from accounting and payroll to enterprise resource planning, customer relationship management, and payments. Our customers receive continuous advice and support through our global network of local experts to help them solve their business problems, giving them the confidence to achieve their business ambitions. Formed in 1981, Sage was floated on the London Stock Exchange in 1989 and entered the FTSE 100 in 1999. Sage has over 6 million customers and more than 12,700 employees in 24 countries covering the UK & Ireland, mainland Europe, North America, South Africa, Australia, Asia, and Brazil. For further information please visit:

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