



LEAF SOFTWARE SOLUTIONS

CASE STUDY

INDIANA CPA SOCIETY: LEADING BY EXAMPLE BY MOVING ACCOUNTING TO THE CLOUD



ABOUT INCPAS

The Indiana CPA Society is a statewide professional association representing over 7,100 CPAs and accounting professionals who are transforming business in Indiana. We serve the public interest as well as our members. We function as an advocate for the profession through education, public awareness, government relations and promotion of high ethical standards. Programs and services offered by us are designed to meet the needs that have been identified for our diverse membership.



THE SITUATION

Jenny Norris, Vice President of Finance for the Indiana CPA Society (INCPAS) was faced with a dilemma. Her legacy accounting software system was coming to its end of life, no longer supporting critical tax updates. While she had budgeted appropriately to migrate to a cloud-based software as a service solution, the COVID-19 pandemic had just started.

"I was asking myself – should we really be spending the money when we don't know what's happening with our membership and our education programs? I was worried about both the financial and time commitment and almost delayed my decision."

Jenny consulted with her CEO and was reminded of their company-wide strategic initiative "to share technology adoption in order to show positive experiences and our commitment to technology." Decision made.

In addition to the lack of critical updates, their legacy system was "clunky" according to Jenny, and it was simply easier to do reports in Excel. "I wanted to find something simpler to use. Our old system did not have good API data connections to our CRM and membership database (NetForum). It just did not have a lot of flexibility – the reporting was not easy to use – I ended up doing a lot of my reporting in Excel because it was easier."

To reduce reliance on Excel, a cloud-based solution with robust reporting features was in order. Jenny continued, "We used Excel a lot more than we should



have. I think a lot of companies fall back into that trap and think it's a lot easier to do things in Excel. We were doing a lot of monthly record keeping in Excel spreadsheets, like prepaid expenses, and deferrals. I would do my financial statements and bank reconciliations in Excel. Plus, I was doing manual adjustments to my forecasts in Excel."

THE SOLUTION

Jenny looked at three cloud-based solutions: NetSuite, Microsoft 365 BC, and Sage Intacct. Her evaluation process included not only the software, but also the organization and the people presenting and supporting the solutions. "I had to rule one out simply because the business representing that software didn't take the time to learn about our company before giving us a standard software demonstration. The demo didn't have anything to do with what our company needed." While evaluating another solution, Jenny found the number and complexity of customization and integrations would not have been cost-effective. "It would have been cheaper on a month-to-month basis, but the implementation costs would have been triple or more. Even when I averaged it out over five years, the cost did not make sense."

Regarding the presentation of the Sage Intacct solution by Leaf, Jenny noted, "The way Leaf went about the initial process was more thorough and complete than what anyone else did. That made a huge difference in my mind. Leaf had done their homework and worked hard to customize the presentation. Leaf also sat down with us and talked about pain points, what do you need, what do you want. I knew Leaf was going to customize the software to me, not customize me to the software."

"I really like the Leaf process. Leaf did not build the solution and simply hand it to me as a complete product – voila – here's your new accounting system. We worked together, with training and setup happening simultaneously. Leaf had us talk through what we wanted to keep, and where we wanted to make tweaks to the way we did things. Leaf also had us export data out of our old system and put it into the new system – that really helped us learn as we

went along. This allowed us to have skin in the game, as opposed to a vendor doing all the work and providing training after the fact. I like to learn by doing, so the Leaf process was a perfect fit for me."

THE RESULTS

"The fact that Sage Intacct didn't require a ton of customization was the biggest thing for me – it fit us better right out of the box. We tweaked it as needed during setup. With the other solutions, you had to buy a bunch of add-ons. With Sage Intacct, the integrations to NetForum and Ariett (our paperless payables and payment disbursement system) were included, so we did not have to build something custom. We didn't have to adapt Sage Intacct to our requirements – it was ready to take on everything we needed it to do."

"The smoothness of the implementation with Leaf was a big success. Sage Intacct has improved our ability to do our day-to-day jobs – we are not as reliant on Excel as we once were. Overall, this change has been a great confidence builder internally – we improved our reporting and realized we were not afraid to try new things."

"There were so many factors that went into our decision to move to Sage Intacct. It was clearly going to be a time savings for us which will save money, but many of the benefits were not necessarily quantifiable. We are now setting an example to our members with a good story to tell. Other benefits include being able to connect directly to our CRM and payables software, and of course to more quickly and easily create effective reports. Overall, it was just something we needed to do. The combination of Leaf and Sage Intacct turned out to be the right fit for us."

As a membership organization, the INCPAS has a responsibility to its members. As part of their strategic plan, Jenny stated, "We are informing our members about technologies to get them moving to the cloud. Setting an example to our members is important to our organization. If we are talking about moving to the cloud and telling our members to move to the cloud – well, we better be doing it too."