



## LEARN Case Study

### Baptist General Convention of Texas says: “No, thank you, to Excel look-alike products.”

#### The Customer

The Baptist General Convention of Texas (BGCT) is a non-profit organization with headquarters in Dallas, Texas. BGCT's mission is to encourage, facilitate and connect Baptist churches within the state. It supports 5400 Texas Baptist churches and over 100 local Texas Baptist associations in extending their ministry into the communities they serve. That means funding approximately 2,000 projects in a given year, in ministry areas such as operating food banks and other community care areas. The BGCT is staffed by ministry consultants, most of whom have little or no business experience. They have advanced degrees in theology or religious education, and focus on new ways of extending their ministry. Many are unversed in technology.

Jill Larsen is the Chief Financial Officer and ultimately responsible for the financial viability of the organization. Jill knows that balancing the books takes much more than a prayer. *“Because of the kind of organization we are, our financial matters have to be above reproach,”* she notes. Relying on so many lay people to get their budgets on target was becoming a monumental problem for BGCT.

#### The Problem

The annual budgeting cycle for BGCT involves 100 staff members who develop department budgets, which are then consolidated. The original budgeting process used Microsoft Excel to create spreadsheets for the prior year's budget. But the majority of staff members are not experts in Excel, nor do they have formal accounting or budgeting training. Some users would tinker with the formulas, commands, and format of the worksheets, so linking spreadsheets became impossible. Excel was completely inadequate for certain needs, such as integrating the prior year's actuals and budget. In a nutshell, Excel was creating more problems than it solved.

The Convention embarked on a mission to find a different budgeting solution. They hired a programmer to create a custom application based on Microsoft Access. But end users found the system cumbersome, confusing and inefficient. “Black holes” left users uncertain how calculations were being

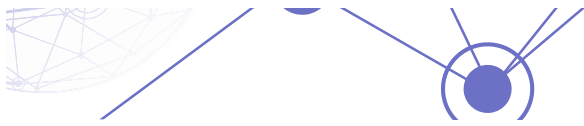
done. Generating reports was next to impossible. A great deal of manual effort was needed to move data from the Access program to the financial software, and users lost the flow of their work due to the distinct nature of the two programs. The overwhelming sentiment of discontent was almost as pervasive for the new Access-based budgeting system as it was for Excel. End users were grumbling loudly.

In addition, one of the key needs of the organization was detailed personnel expense planning. Prior systems were so cumbersome, this function was completely left to the accounting area. But then department managers were not in control and did not feel responsible, resulting in a lack of ownership. The organization never knew where it was in preparing the required budget numbers. There were other problems as well: no version submission or version control functionality. It was impossible to know, real-time, where an individual department stood with respect to achieving a desired target. Managers wanted a system that allowed them to make a specific change and instantly see the impact of that change. Finally, the process required users to have last year's budget and this year's actual data in front of them in order to complete the budget. Praying that the numbers were right was not helping.

With so many people in the organization complaining about both the Excel and Access programs, the Convention leadership realized it had exhausted the possibilities without buying a formal budgeting product. *“We knew that we needed to do something different,”* says Jill. *“A better solution had to be found for our budgeting process. The status quo simply was not acceptable.”*

#### The Evaluation

A team was created to find the right corporate budgeting software for the unique needs of BGCT. From references and BGCT's own research, a short list of five corporate budgeting solutions was created. Upon closer examination, however, it was clear none of them provided the right balance between the advanced budgeting features and usability. Even worse, the vendors all peddled Excel-like products and touted a similar mantra: *“People already know Excel and are going to*



love it.” The BGCT team already knew they didn’t. *“All of the solutions retained a look and feel similar to Excel, which would just bring BGCT back to where it started from,”* notes Jill. *“That would not go over well with our end users.”*

The team at BGCT came across XLerant’s BudgetPak from their online search. At first glance, it seemed to provide everything they needed. An invitation was extended to XLerant to participate in the vendor selection process. As the BGCT team went through the demo, it became clear that XLerant’s product provided all the functionality they needed in an interface that was intuitive and logical. It used plain English that even non-financial users could understand. Simplicity was important because, with only two financial people supporting 40 departments, users needed to be self-sufficient—there was no time for handholding. The final decision was made to purchase XLerant’s BudgetPak.

### The Implementation and Support

XLerant offered to have their top implementation professionals manage the project. This proved to be a major keystroke in the successful implementation of the software. According to Jill, *“XLerant was patient with us and helped guide us through identifying where our needs were. They showed us how to make the application work specifically for us. They were reassuring and struck a great balance without being pushy. And XLerant was understanding and flexible with respect to our financial constraints. We learned that we didn’t need to spend a great deal to accomplish a great deal.”*

The implementation team at BGCT feels XLerant was responsive and helpful. With so many different department and accounts, BGCT needed hands-on expertise to make the conversion a success. XLerant helped BGCT navigate through many issues reflecting the uniqueness of their business. *“Our IT department says if we get data from XLerant, it is going to be right. Working directly with their experts was extremely valuable,”* Jill says. *“We got answers to our questions and resolutions to any outstanding issues right away.”* Jill has done five general ledger conversions and three other major system implementations over the years. She believes that the XLerant conversion was by far the smoothest and least stressful she has been through. Total implementation time: with 100 users budgeting for 2,000 projects, the conversion was accomplished in only one month.

### The Result

BudgetPak has made believers out of the 100+ users at BGCT. According to Jill, *“Our users have been through two major conversions and hated them both,”* Jill notes. *“But now, our user acceptance is high because BudgetPak gives them what they*

*need to do their budgets. They like using BudgetPak—they can do everything with it. There is transparency on personnel planning, and security safeguards to ensure that confidential salary information isn’t accessible by the wrong people. The reports work really well and we can easily get the budgets into our financial software. We can also see where everyone is in the budgeting process, which helps keep everyone on track.”*

XLerant’s ongoing attention to customer satisfaction also helps keep user acceptance high. Early on, Larry scheduled training sessions with user groups to be sure they understood all the functional features of the software. And in the three years that BGCT has been using BudgetPak, XLerant has been providing prompt support as needed. *“No other software firm has been as responsive,”* Jill declares.

“We have 100 happy users who would agree that BudgetPak makes our budgeting totally transparent and above reproach.”

### The Conclusion

BGCT no longer prays that the budget numbers are right. They don’t have to. BudgetPak has made the annual budgeting cycle a more precise exercise in financial stewardship. Jill is a believer too, noting that *“Having dedicated software that works well really makes life easier for everyone.”*

BGCT decided that budgeting systems should not look like Excel—and why would anyone want them to? XLerant created BudgetPak with the viewpoint that budgeting is as much a communication process as a financial one. There needs to be a balance between user flexibility, financial controls, and IT standards. Jill would agree.

*“When other companies call for a reference, we rave about the product. We have 100 happy users who would agree that BudgetPak makes our budgeting totally transparent and above reproach.”*



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