

Cloud-based  
Sage Intacct allows  
organization with  
8 remote locations  
to work seamlessly  
during COVID

## Case Study: Eastern Aleutian Tribes

Eastern Aleutian Tribes is a progressive tribal health organization operating within the Alaska Tribal Health System since 1991. From its humble beginnings as a small provider with a budget just shy of \$500,000, it has grown into an 8-figure healthcare organization while expanding its professional health service offerings to an area that now covers over 100,000 square miles of remote Alaskan territory.

But more importantly, in the last three years, Eastern Aleutian Tribes has increased the number of state grants which has allowed them to expand their behavioral health offerings to include services such as opioid tapering recovery treatments, peer support groups, as well as the Native Connections grant program which gets native peoples connected back to their culture and away from drugs, alcohol, and domestic violence. With over 8 remote clinics scattered across Alaska, the most remote of them being in Adak. "It's a constant challenge getting supplies and patients back and forth - even just mail regularly," says Anita Moran, Finance Director.

### Problems With Microsoft Dynamics GP

Eastern Aleutian Tribes had been using Microsoft Dynamics GP for years before Anita Moran joined as Finance Director. And while it may have served as an adequate financial management solution in the organization's early years, once they started adding more clinic locations and increasing their workforce, it quickly became apparent Dynamics GP was going to hinder any further growth and bottleneck resources.

Specifically, the accounting team at EA Tribes frequently encountered the following issues:

- Overly complicated and difficult system for new users
- Manual and paper-based purchase requisition workflows

### COMPANY OVERVIEW

Eastern Aleutian Tribes is a progressive tribal health organization operating within the Alaska Tribal Health System since 1991. From its humble beginnings as a small provider with a budget just shy of \$500,000, it has grown into an 8-figure healthcare organization while expanding its professional health service offerings to an area that now covers over 100,000 square miles of remote Alaskan territory.

### EXECUTIVE SUMMARY

#### Previous Software:

Microsoft Dynamics GP

#### Results with Sockeye:

- Upgrade to the cloud allows accounting team in all 8 clinics to continue working seamlessly during COVID, which would've been impossible with GP
- Customized grant management reporting system developed by Sockeye for Sage Intacct allows organization to customize reporting period for grants, saving hours every week
- Cloud-based purchasing requisition workflow has saved the organization weeks of time going back and forth with manually created, updated, and often unnecessarily duplicated purchase orders

- Flawed reporting system unsuitable for grant management reporting
- Overly complicated and user-hostile system

“When I first joined the company a few years ago and started using GP, I immediately realized there was no rhyme or reason to anything,” says Anita. The chart of accounts was extremely long. The lack of robustness in the software made it so code schemes could be changed without triggering duplication warnings, making tracking different aspects complicated and confusing.

For example, there were hundreds of employee position codes for the organization, although their workforce was around 80 in total. Overall, ease of use for new users was practically non-existent, wasting valuable time.

### Manual, paper-based purchase requisition workflows

When it came to purchasing workflows, Dynamics GP seemed to be stuck in the 20th century. “Every purchase requisition ended up being a very manual process of duplicate entries, spreadsheets, and documents, without a central location for them,” says Anita. This is due to the fact that every purchase order would get filled out by someone, which then needed to be signed by the appropriate manager, and then to the finance director for approval. It would then go to a purchasing technician who would process it depending on the vendor.

But depending on which system it was, certain deliverables were faxed over to certain vendors to fill the orders. As Anita explained, “You’d have one person putting it on a spreadsheet, then another entering it online, and yet another finally filling it in GP... but that wasn’t even the worst part.” Due to the fact that some of the clinics are quite remote, the manual nature of processing every purchase order would take a significantly longer time due to geographical factors.

### Flawed reporting system unsuitable for grant management reporting

EA Tribes ran into major frustrations when it came to grant management reporting in Microsoft Dynamics GP. “To put it simply, Dynamics GP doesn’t let you run reports that cross the fiscal year... and since many of our state grants run from July 1 - June 30, and with the increasing number of grants we were getting, things quickly got out of hand,” says Anita.

Essentially, Anita and the accounting team were forced into a position where they had to run reports in multiple years, then add them together to make sure the grants were being properly reported. “This made it overly difficult to go back and reconcile to make sure nothing got accidentally posted after doing quarterly reports,” says Anita.

### Infrastructure-intensive upgrade leads EA Tribes to Sockeye

While the aforementioned issues created inefficiencies and wasted time and resources, the straw that really broke the camel’s back came in the form of a forced upgrade of their existing ERP software. Since Dynamics GP ran on-premise and had considerable infrastructure to upkeep and maintain on each of EA Tribes’ 8 clinics, this presented a major issue when making the decision whether to upgrade or move to a different solution.



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**Anita Moran**  
Finance Director,  
Eastern Aleutian Tribes



“Upgrading GP would not only mean having to physically upgrade all the servers, but also replacing infrastructure as well. This would be extremely cost intensive from an up-front, fixed-cost perspective,” says Anita. And when weighed against the other issues the team was having with Dynamics GP, the team decided that it was time to switch to a more flexible solution. “Luckily, we had already been a customer of Sockeye before reaching out for this specific request,” says Anita. “We had even attended a few of their presentations and were impressed with their demonstrations of Sage Intacct.”

During their discovery meetings, Sockeye founders Nick Brorson and Eric Ward personally ensured all bases were covered with respect to Anita and EA Tribes’ needs. “When other companies would’ve given you a phone number to call, they made sure someone would be physically there to help us when it came to training our team and making sure we were ready to go live,” says Anita.

And while it was imperative the new ERP solution be top-notch, cloud-based, and provide a host of improvements on their previous software, Anita also had one very important request. “I wanted someone that understood my language... the language of finance and accounting. And Sockeye absolutely delivered with Esther Goodstein, their Senior ERP Consultant that’s completely dedicated to our success with Sage Intacct.”

Implementation went completely without a hitch.

### **How Sockeye + Sage Intacct has made remote accounting seamless in a COVID world**

The introduction of Sage Intacct into the Eastern Aleutian Tribes organization has created a plethora of efficiencies and improvements in the way they do business. Besides eliminating their need for expensive, on-premise infrastructure, the switch to the cloud-based, robust Sage Intacct ecosystem has allowed EA Tribes to continue working as optimally as possible - regardless of how remote their clinics are from headquarters - under current COVID distancing protocols.

More specifically, some of the most meaningful improvements are detailed below.

#### **Customized and streamlined grant management reporting**

After dealing with the horrors of reconciling grant amounts in multiple reporting years when previously using Dynamics GP, Anita can finally breathe easy. “Esther has programmed a function that allows us to customize our reporting period for our grants however we’d like. Grants can now start and end whenever they want to - it doesn’t impact our reports.” This has saved the accounting team hours of time that used to be spent reconciling reports from multiple years.

#### **Ease of use**

According to Anita and the rest of the accounting team at EA Tribes, Sage Intacct is much more intuitive and easy to use, even for complete beginners. “Before we even went live,” Anita says, “Esther was there, on site with a big whiteboard, holding live training sessions to help our team get acquainted with the way Intacct works.” And while she did have to take some time to understand exactly how Dimensions work in Sage Intacct and get used to the overall structure, the ease with which you can do big things in Sage Intacct is incomparable to any other ERP software out there.



(Sockeye) was there, on-site with a big whiteboard, holding live in-person training sessions to help our team get acquainted with the way Intacct works.



**Anita Moran**  
Finance Director,  
Eastern Aleutian Tribes



## Electronic purchasing workflows

Sockeye has brought EA Tribes purchasing workflow into the 21st century with Sage Intacct's purchase order management software. As previously mentioned, with Dynamics GP, purchase orders would go through a nightmare process where documents were written by hand, faxed, approved, rewritten a number of times, posted online, and finally entered in GP.

Now, all purchase orders and their logical flows are handled in one centralized location - in the cloud.

## Ease of access, especially taking COVID into account

Given the COVID situation and taking into account that EA Tribes has 8 remote clinics - one of them being the westernmost city in the entire USA - perhaps the greatest advantage that the organization has gained from switching to cloud-based Sage Intacct has been the ease with which team members can access the application itself.

"When we were using GP, everything was on-premise. The infrastructure, the servers... everything," says Anita. "I have no idea how we possibly could be doing this if we were on GP. There's no way."

Being able to access Sage Intacct from as far away as Adak Island means that the EA Tribes team can continue working from home while management can easily keep track of employee work.

## Dedicated, personalized service from start to finish - and beyond

If you were to ask Anita what her favorite aspect of this entire transformation is, her answer may surprise you: "Esther Goodstein, our dedicated consultant!" Because while using a robust ERP software solution like Sage Intacct can create major efficiencies in a business while also helping them plan for the future, it's only as powerful as the people that are using the system itself.

To really bring out all that Sage Intacct has to offer, it requires a professional who's well-versed in both accounting and technology, fully dedicates themselves to a project, listens to the needs of the client, and provides active, in-person support on demand. That's why Sockeye, through its customer success plan, is committed to the success of a client's business well beyond the go-live date. "I think it's a huge advantage to have Esther, an accounting person, on the team. She's dedicated to our business and that's a really big deal to me and my business," says Anita.



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### ABOUT SOCKEYE

Sockeye is a leading consulting services firm that leverages Sage Intacct to help businesses achieve full cohesion and transparency between operations, finance, and accounting.

Contact us today for a demo and see how Sockeye can simplify your accounting ecosystem.

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