

# American Marketing Association Digs into Data to Deliver Better Services

Industry	Client Since	Solution
Non-profit national trade association	2017	Sage Intacct

“With Sage Intacct, we’re able to expand our services to the organization without adding financestaff. And the fact that we will be able to get our accounting done in less time will save the organization money that can be repurposed for other priorities.”



**Jeremy Van Ek**  
COO, American Marketing Association

When chief operating officer, Jeremy Van Ek, arrived at AMA, the association had technology issues which hampered its mission. AMA’s technology was aging & most systems were not well integrated. “As a membership association, how we serve members is critically important to us. The more we know about them, the better we are able to provide the right services and resources,” He explained.

In order to drive a better membership experience, AMA wanted to replace its legacy association management system, Personify, with new cloud-based CRM and content management systems (CMS). The move to an entirely cloud-based technology stack also created the need to replace Microsoft Dynamics Great Plains, an on-premise legacy accounting system used for nearly 20 years.

AMA operates five lines of business: memberships, publications, live events, professional certifications, and corporate sponsorships. The organization functions both as a B2B and B2C in terms of payment transactions - making things like data integration and reporting complicated. “It was difficult for me, the accounting team, and our business managers to access financial information in Great Plains, so it was not looked at as frequently as we would have liked,” Van Ek recalled. “For example, some of our events lost money and this was not fully realized. With Sage Intacct, we can access real-time information about gross margin



on events, so we’ve restructured or cancelled unprofitable events and scheduled more successful ones.”

## A “big bang” approach to a cloud-based future

The goal for technology innovation was to drive an improved member experience, so seamless integration between major business systems was critical. AMA adopted an entirely new, cloud-based technology, starting with Salesforce CRM. “We wanted a modern, cloud-based financial platform that integrated easily with Salesforce,” said Van Ek.

After reviewing Oracle NetSuite and Accounting Seed, AMA chose Sage Intacct, because “it works like a financial system should. With zero clicks, managers are presented with departmental budget vs. actuals on their home screens.”

The AMA IT team no longer has to support hardware infrastructure or perform upgrades. “Comparing the licensing cost of cloud-based applications versus premise hosted systems, we expect to realize savings of approximately \$250,000 over the long term with our new cloud technology stack, mostly as a result of our transition from Personify to Salesforce.”

AMA worked with technology consultants at BT Partners, who were instrumental in both strategic upfront planning and implementation support. BT Partners conducted a functional requirements workshop to map out business processes and workflows before setting up the Sage Intacct chart of accounts. With a hands-on approach throughout implementation, they helped configure Sage Intacct for AMA's exact needs and provided training.

## Gaining the insights & efficiency to deliver more value to members

Sage Intacct delivers the right information needed by each user, in the best format to make insights meaningful. "When a business



owner logs in, their department-based dashboard appears. Three reports display: Current month and YTD budget vs. actuals, actuals by month, and budget by month. With just one click, they can drill in to see further details about transactions or budgets."

Dashboards give managers accurate reports without the risk of making errors by running reports with the wrong parameters - something that happened in Great Plains because it worked based on numerical codes. Drill downs into transaction details are easier, reducing inquiries to Accounting.

The dimensional chart of accounts in Sage Intacct tags information so AMA can report on the things most critical to success. "Before, I extracted a lot of data to Excel and manipulated it. Now, Sage Intacct has all the information I need, which saves at least an hour a week - more during heavy reporting periods such as month-end close or fiscal year planning. The reporting is so flexible that I can spin up another report that slices and dices the information differently in minutes."

"Sage Intacct makes the P&L rodeo every month much more transparent and efficient. I drill down into details and ask questions through the integrated on page chatter function. Instead of questions and answers in a separate email chain, that information gets stored on the record."

Before the Sage Intacct and Salesforce integration, the accounting team had to manually load a large journal entry from the Association Management System each month. The accounting staff spent 5-10 hours on this process monthly. "Now that Sage Intacct and Salesforce are completely integrated, we can see data accumulating throughout the month. For example, every time a membership is purchased on our website, it integrates to Sage Intacct immediately."

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Previously, budget to actuals reporting was completed in a separate business intelligence tool, but now resides in Sage Intacct. With the help of BT Partners, AMA will soon enjoy further efficiency gains by integrating Winvoice AP automation.

Full integration between Sage Intacct, Salesforce, WordPress, and Winvoice will enable the team to provide the same services to the organization in less time. "We keep an eye on how much we spend on overhead versus delivering programs. The less we spend running the back of the shop, the more money we have to deliver value to our members."

### Company Overview

The American Marketing Association (AMA) is a nonprofit national trade association that provides an essential community for marketing professionals seeking education, networking and professional development. Nearly five million people a year turn to the AMA for exclusive content, scholarly journals, national and regional events, training courses, local chapter networking, and certification opportunities.