

# Passport Health Credits BT Partners with Unlocking the Power of Sage Intacct

Industry	Client Since	Solution
Franchisor	2010	Sage Intacct

“BT Partners isn’t a transactional partner – they develop and maintain long-term business relationships. I’d call them a talented team of really good people.”



**Nick Skaff**  
VP of Finance  
Passport Health

The world has started traveling again, and that’s great news for Passport Health. The company is the largest provider of travel medicine services in the United States, with over 250 travel clinics – both franchises and corporate owned – throughout the country. Unfortunately, when the pandemic hit, Passport Health’s clinic traffic came to a screeching halt. Seemingly overnight, the company lost 95% of its revenue and had to lay a good portion of its staff. For any ordinary company, this may have been the end. But Passport Health had the business agility to survive the downturn and come back stronger than ever. Supporting that business agility is Sage Intacct and BT Partners.

## Pandemic Response Requires Quick Action

Nick Skaff joined Passport Health in 2019 as the organization’s VP of Finance. When he arrived, the company had been using Sage Intacct for a few years already. “I joined the organization, got acclimated, met BT Partners, learned Sage Intacct – and then the pandemic hit,” says Skaff. “To say that the business was devastated would be an understatement.”

With revenues halted, management needed to act quickly.



“I spoke to BT Partners about our situation,” he recalls. “We had to reevaluate everything and cut costs wherever possible,” he says. “BT Partners went to bat for us. They negotiated a lowered subscription fee for Sage Intacct, and we put the pause on functionality we wouldn’t need while we waited for things to return to normal. Without their support and assistance, we could have fallen into a bad spot making it very difficult to rebound. They jumped into the operational battle with us and it’s one we are gradually conquering.”

## A Healthy Rebound

Fast forward to 2022, and Passport Health is in a healthy financial position and has rehired a significant number of its staff. “We survived, and now we’re ramping back up,” says Skaff. “It’s remarkable to see how scalable Sage Intacct is. BT Partners effectively helped us change and evolve our use of the software as business changed. We scaled up, down, then up again and Sage Intacct kept up the pace.”

As Passport Health ramps up operations, it is adding functionality to its Sage Intacct instance. “We’re looking at adding the inventory module this year” says Skaff. “We like the best-of-breed

approach for a growing organization because it means that we only pay for what we need, adding functionality when we need it and only paying for what we use.”

## Maximizing the Solution’s Value

With clinics in the United States, Canada, and the United Kingdom, the company deals in three currencies. “Sage Intacct is built to handle a global operation,” Skaff says. “It greatly simplifies our international consolidations too. That saves our finance team



from time-consuming, manual work. Instead, they can focus on strategy and growth.”

BT Partners helped Passport Health gain the tools that simplify its budget process and integrate it into its financial application. “Previously that was all done outside the system,” Skaff says. “Now budgeting is an integral part of our operations. With the increased visibility, we can better plan our expansions and optimize our investments.”

To maximize the value of Sage Intacct for Passport Health, BT Partners designed numerous custom reports. For example, the company uses a proprietary application for its clinic operations. BT Partners brought key data from that application into Sage Intacct and included it in the company’s financial reports. “We’re bringing together business data in more effective and efficient ways,” notes Skaff.

## Streamlining Acquisition Integration Accounting

Field financial operations are complex. With Sage Intacct, the company can effectively track financial performance of each location and easily roll up to a consolidated view. When Passport Health made four acquisitions toward the end of 2021, it was simple to account for the acquisitions and consolidate them into

Passport’s formats within Sage Intacct. “I thought it would be a nightmare, but the software is designed with that level of flexibility built in,” notes Skaff. “Everything in Sage Intacct is designed to support multi-entity organizational structures.”

Passport Health is part of Outlier, an innovative holding company that operates several very different enterprises. One is Fun Brands, an organization that lives up to its name by delivering the best kids’ birthday parties on the planet, offering 100% private parties and fun-filled events that include huge inflatable indoor

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playgrounds and colorful party rooms. Another entity is Realty Executives, one of the world’s largest real estate franchise groups. It’s important to understand Outlier’s diverse holdings since, while Passport Health is the main user of Sage Intacct, the application is flexible enough to serve each of the other entities just as effectively as it serves Passport Health.

## Partner Amplifies ROI

Skaff estimates that the company was close to a positive return-on-investment (ROI) on its investment in Sage Intacct in 2019. “2020 was tough, but it could have been worse without BT Partners’ help,” he says. “In 2021 we turned the corner, and by 2024 we’ll have outrun the price of the product and have a highly favorable ROI. Much of that return comes through the efficiencies in the software that allow us to grow without necessarily adding more staff. That’s a big contributor to the ROI.”

Without minimizing the power and flexibility of Sage Intacct, Skaff says the main reason Passport Health has seen such success with the product is because of BT Partners. “BT Partners isn’t a transactional partner – they develop and maintain long-term business relationships. That being said, they are top-notch consultants, not just nice people. You can’t bluff in this industry; clients know if you don’t have the business or product knowledge you claim.”