

NON-PROFIT

## SSi Consulting Customer Solution Case Study



### ABOUT TRUIST

[www.truist.com](http://www.truist.com)

Organization Size:  
**55 employees**

Software and Services:  
**Microsoft Dynamics® GP**

Industry:  
**Technology Provider for the Non-Profit Sector**

Country/Region:  
**United States**

Business Need:  
**Advanced Reporting**

**Companywide Solution Training**

Issue:  
**Accounting Software Management**  
**Deep Financial Reporting and Forecasting**

Microsoft Partner:  
**SSi Consulting**

# TRUIST

### SITUATION

Truist is a leading technology provider, making it possible for companies to conduct workplace giving campaigns through donations and/or volunteerism. Instead of using paper pledge forms, they work with corporations to set up giving campaigns on their websites. Truist enables more than \$2.5 billion in contributions to charitable organizations around the world and 3,000 programs are powered by Truist products and services.

Truist tried to implement Microsoft Dynamics GP in 2007, prior to meeting with SSi. After two years with Microsoft Dynamics GP, Truist was not optimizing the powerful solution they already had in place. "My controller didn't know how to use the software and my accountant only knew the very basics of the solution," said Berry Sethi, Chief Financial Officer (CFO) of Truist. "We were basically paying for something we weren't even using," continued Berry.

Because Truist is a for-profit organization involved with not-for-profits, they tracked 2 sets of books and had multiple systems in place to manage them. In addition to this disconnected work environment, Truist underwent manual reporting of their financials and account receivables. This processing of data took 60-90 days each month and by then, that data was old and no longer pertinent to their business needs.

Truist had the right software, but needed proper training to streamline their reporting needs and to benefit from the business intelligence Microsoft Dynamics GP is known to provide. Berry Sethi recalls, "After two years, we realized the direction we were headed with our solution provider was not one we could endure much longer." They needed a partner whom they could trust to take them to the next level of a productive business.

### SOLUTION

In 2009, Truist began the search for a new Microsoft Dynamics GP solution provider and found SSi Consulting. In addition to being a trusted Microsoft Dynamics Partner, SSi Consulting was referred to Truist by another firm. In November of 2009, Truist started work with SSi Consulting.

SSi Consulting assisted Truist in setting up the reports they needed and provided exceptional training, so all Truist employees could get up to speed. Truist can now "slice and dice" data in multiple ways. For example, they have a complete dashboard view of revenue by customer that they didn't have insight into before. Truist's controller and accountant now know Microsoft Dynamics GP inside and out due to SSi Consulting's training program and support. "Lisa Armstrong at SSi Consulting is excellent. She is our consultant for on-site training and is very responsive and an absolute pleasure to work with." Berry Sethi shared.

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"We've learned that if you can manage your inflow you can definitely manage your outflow, which is where Microsoft Dynamics GP has made a huge impact on our business."

*Berry Sethi, Chief Financial Officer of Truist*

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**SSi**  
**CONSULTING**  
[www.ssiconsulting.com](http://www.ssiconsulting.com)

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## BENEFITS

### Reduced Data Entry Redundancy

Since Truist was accustomed to manual data entry, proper use of Microsoft Dynamics GP made their lives easier in multiple ways. They previously entered invoices into Microsoft Excel and then manually re-entered that same data into Microsoft Dynamics GP's Receivables Management. Now that everyone knows how to use Microsoft Dynamics GP, they can enter it once into Microsoft Dynamics GP and that data is seamlessly reported and shared in multiple ways throughout the company.

Truist also takes advantage of automating uploads into Microsoft Dynamics GP. They can upload Microsoft Excel spreadsheets into Microsoft Dynamics GP and quickly print out the invoices pertaining to that upload, saving them time and eliminating manual error.

Truist's overall invoicing process has seen major improvements with Microsoft Dynamics GP in place. Prior to SSi Consulting and Microsoft Dynamics GP, invoices would fall through the cracks and Truist was forced to follow up with clients, sometimes three months after the service was actually provided, causing questions and delayed payments. Now with Microsoft Dynamics GP, they can create invoices and send them out automatically. Truist can easily dive into invoice details, such as date sent, to whom and they can even set up dates for reminders. This automated process makes it easy for them to collect funds when due, so it's fresh in their client's minds and pertinent to their current budgets.

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"Now that we can properly leverage the functionality of Microsoft Dynamics GP, I can close out monthly reporting in 15 days, compared to the 60-90 days it used to take me."

*Berry Sethi, Chief Financial Officer (CFO) of Truist*

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### Timely Reporting

Since Truist is essentially servicing both not-for-profits as well as for-profit corporations, they have intricate reporting needs. Truist provides the software for corporations so it's easy for them to make donations to not-for-profits and also ensures those donations get distributed accordingly. With Microsoft Dynamics GP, Truist can see when and how much was collected for a certain client and when and where it's been paid out to. This gives Truist full control of their overall operations. In some cases, Truist's clients also match a percentage of the giving campaigns and with the insight Microsoft Dynamics GP provides, this data remains accurate and is received by the proper charity in a timely fashion.

Microsoft Dynamics GP also provides in-depth reporting of Truist's financials showing year over year and month over month costs in relation to revenue. Truist knows where they stand on a day to day basis and is able to make timely and accurate decisions because of this. "Now that we can properly leverage the functionality of Microsoft Dynamics GP, I can close out monthly reporting in 15 days, compared to the 60-90 days it used to take me," Berry said.

Their payables are also on track now that they have deep insight into vendor expenses and purchase orders. Truist's relationships are not at risk since they can easily and quickly provide payment to their trusted partners. Karla Gammon, Marketing Manager of Truist says, "It's much easier for me to work with vendors since they're getting paid on time. It has made a huge difference with our relationships across the board."

### Marketing Made Easy

In addition to a deep view of company financials, Truist's marketing department is seeing benefits as well. Before Microsoft Dynamics GP, Karla Gammon, Marketing Manager of Truist, would wait two weeks for a response on what her current marketing budget was in relation to up-to-date views of total spend for the year. Now it takes a matter of five minutes to figure out her current marketing budget.

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*"With Microsoft Dynamics GP, we can automatically see where we are now as well as how much money we have coming up."*

*Karla Gammon,  
Marketing Manager of Truist*

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Marketing can also see exactly what their clients are doing, allowing for optimal business analysis. For example, she can see how many clients they have, total amount of money collected as well as distributed. Karla can also see a percentile breakout of funds by specific charities. This information is readily available and a huge benefit when determining their marketing objectives.

## SUMMARY

"SSi Consulting and Microsoft Dynamics GP has made us more efficient and productive due to the timely reporting and business intelligence we now have access to," said Berry Sethi. Truist is able to grow 10% year over year because of the streamlined business processes they now have in place thanks to SSi Consulting and Microsoft Dynamics GP.

