

Historic Mount Vernon Builds for the Future with Microsoft Dynamics® GP



Mount Vernon is the most popular historic estate in America, with over 1 million visitors each year.

Project Highlights

With the help of SSI consulting, Mount Vernon has:

- Analyzed business processes to identify required system improvements.
- Developed a technology roadmap to improve system integration and business intelligence.
- Automated repetitive financial tasks saving up to xx hours per month.

About Mount Vernon

The oldest national historic preservation organization in the country, Mount Vernon is owned and maintained in trust for the people of the United States by the Mount Vernon Ladies' Association of the Union, a private, non-profit organization (501c3) founded in 1853.

www.mountvernon.org

Mount Vernon, the peaceful estate where President Washington sought refuge from war and politics, preserves the character of our country 200 years past. Today, more than 1 million visitors tour the renovated mansion, stroll through meticulously maintained gardens, enjoy a family meal and purchase mementos of their connection with history. Educational programs and an encyclopedic website also deliver on Mount Vernon's mission to educate visitors on Washington's legacies and inspire future generations.

The Mount Vernon of today is a vibrant non-profit organization taking in approximately \$40 million dollars in donations and revenue, requiring modern systems and fiscal discipline.

Unconnected line of business systems

For the past 10 years, Microsoft Dynamics GP has provided the financial management backbone for Mount Vernon, but when Phil Manno was hired as Chief Financial Officer, he knew it could do far more for the organization. "Mount Vernon has grown tremendously over the last 15 years but the back office systems have not kept pace," noted Manno.

In addition to Dynamics GP, there were four unconnected systems managing three primary lines of business. Mount Vernon's revenue is generated from three equal parts – donations, front gate admissions and retail sales (which includes restaurant operations).

Manno's first step was to engage a technology partner who understood the complexity of the business as well as the nuances of non-profit organization work environments. Change management was a key component in helping to modernize operations.

"We needed a business partner who was able to dive in, understand our issues and help us plan for the future."

Phil Manno, Chief Financial Officer

Based on recommendations from Microsoft, Manno chose SSI Consulting to engage for a business process analysis – to review current systems and provide recommendations for improvement. Working within budgetary constraints, Mount Vernon needed to make the most of their current systems while working towards a unified business management system that would provide better insight across all aspects of operations.



www.ssiconsulting.com
410-944-3369

1616 Anderson Road | McLean, VA | 22102

10440 Little Patuxent Parkway | Suite 300 | Columbia, MD 21044



Mount Vernon receives no tax dollars – fully supported through revenue from the retail and dining facilities, ticket sales and donations.

SSi Consulting

SSi Consulting has been helping mid-Atlantic companies increase performance and boost productivity for more than 30 years. We are a Microsoft Gold Partner and winner of the Mid-Atlantic Microsoft Partner of the Year Award. Our Project Management process delivers the right technology, at the right price, on time and within budget.

Call us today to build for the future.

Bill Aiton
703-297-5070

Karen Riordan
410-277-4549

Simple changes that have a big impact

Through the business process review, the SSi team identified many Dynamics GP features that the Mount Vernon financial team wasn't using or could be used more efficiently. High impact efficiency improvements included:

- Smartlist training to simplify search and reporting,
- Automation of retail transaction upload,
- Streamlining bank reconciliation process.

Through department-wide training, redesigned security, automation and workflow deployment, the SSi team helped the accounting team improve efficiency and ensure fiscal integrity. Through their knowledge of best practices, the SSi team gained the confidence and ultimate buy-in from the Mount Vernon financial team.

“In the 10 months since we have been working with SSi, our use of Dynamics GP has grown 35-40%.”

Phil Manno, Chief Financial Office

“SSi has been very valuable in helping us manage the culture change required to bring Mount Vernon into the present,” says Manno.

Looking ahead instead of into the past

As Mount Vernon executes the long term plan to unify their business management systems, the ultimate goal is to act on information proactively instead of reactively. As Manno notes, “We can only view information in retrospect now. We need forward looking information to analyze and make decisions that really impact the business.”

Full integration of line of business systems that will consolidate data will allow Manno's team to analyze visitation, monitor trends in donations and respond to changing visitor preferences.

“SSi helped us map where we were and where we are going. We have come a long way, but still have a long way to go,” adds Manno.

Find out how SSi Consulting can help you put the systems in place that will take your non-profit organization further. Visit our website at www.ssiconsulting.com or contact Bill Aiton at 703-297-5070, baiton@ssiconsulting.com or Karen Riordan at 410-277-4549, kriordan@ssiconsulting.com.



www.ssiconsulting.com

410-944-3369

1616 Anderson Road | McLean, VA | 22102

10440 Little Patuxent Parkway | Suite 300 | Columbia, MD 21044