

**EMBRACE THE** “Real-time numbers means real-time insight” **DYNAMIC.**

## Wingspan is rediscovering their Microsoft Dynamics GP solution by extending it to meet their business intelligence technology needs.

With a 16 million-dollar investment portfolio and multiple non-profit organizations to manage—Wingspan’s goal was to find state-of-the-art business technology that would give them the information they needed to make accurate and strategic business-planning decisions. By implementing Microsoft Dynamics™ GP business intelligence solutions, they are taking the first steps toward achieving this goal.

Customer:

**Wingspan/Bellefaire JCB**

Web site:

**[www.bellefairejcb.org](http://www.bellefairejcb.org)**

Country or region:

**Cleveland, Ohio**

Industry:

**Non-profit**

Customer profile:

Bellefaire JCB (a non-profit organization) is one of the nation’s leading providers and innovators of wellness, advocacy and behavioral healthcare for children, youth, and their families.

Microsoft software used by Wingspan for business intelligence:

Microsoft Dynamics GP including Business Intelligence Layer, Business Portal, SmartList Builder, Analytical Accounting, Cashflow Management, Collections Management, and Grant Management. Microsoft FRx® Forecaster, Microsoft Office Outlook®, Microsoft Sarbanes-Oxley Accelerator, Business Alerts, and Smartlists.

### Wingspan/Bellefaire JCB

“With the wide range of products Microsoft offers, we’re not plugging holes. The product roadmap is right, and is going to take us where need to go.”

—Tom Browne, Chief Financial Officer (CFO), Wingspan.

#### Business needs.

Wingspan’s operations cover a broad range of services ranging from childcare and foster care residential treatment programs, to programs for autistic children, school-based programs, and in-house counseling. With each one of these areas presenting unique funding challenges, Wingspan recognized their growing need for a sophisticated business management solution that could handle these diverse challenges.

“I’ve been at Bellefaire JCB and Wingspan for over 10 years and inherited an old financial application called ACCPAC—an outdated DOS-based application that did debits and credits okay, but that’s about the extent of it—it was no where near state-of-the-art,” comments Browne.

Wingspan’s business has doubled during this time and along with it, their complexity. They needed to expand their functionality to handle that growth and decided it was time to conduct a search for new technology options. This led them to look into some of the major business intelligence software players out there including Blackbaud, SAGE, American Fundware, and Microsoft Dynamics.

#### Solution.

After an in-depth software search and evaluation process, Wingspan focused in on Microsoft Dynamics GP business intelligence solutions to help them more effectively meet their complex business needs.

“We really needed an application that could slice and dice the operations. We have an awful lot of [stakeholders] we have to please including 110 different public funders, several hundred individuals [and] a couple dozen private insurance companies,” says Browne, “Our direction right now is to pull as much out of Microsoft Dynamics GP as we can with the add-on modules.”

As the CFO for Wingspan, Tom Browne played a key leadership role in developing the plan to implement Microsoft Dynamics GP business intelligence solutions. A major component of that plan involves using Business Portal for Microsoft Dynamics GP and Key Performance Indicators (KPI) to set and monitor divisional targets. Because each program is unique, it is difficult for Wingspan

"We're all about trying to provide services to people. Ten years ago, our administrative costs were running about 15 percent. With the new practices we put into place including Microsoft Dynamics GP, we've been able to get that down to about 10 percent."

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to implement a centralized performance measurement system. Customized views using Business Portal will allow individual program managers to track the information most relevant to them.

Wingspan has rolled out Business Portal for Microsoft Dynamics GP to approximately half of their staff with only two divisions left to go. They plan to train the remaining two divisions by the end of the year. Wingspan is also migrating from their current fundraising program, Blackbaud's Razor's Edge, to Grant Management for Microsoft Dynamics GP and will adopt Microsoft® Office Outlook® business-wide this year.

"We're going to be in a lot better position 6–9 months from now as we bring these business strategies on—I'm very optimistic about where we're going. As we progress and the products progress, I think we're going to have a much better technology solution down the road. Our business changes so often we've got to change with it. Therefore, we need flexible solutions like Microsoft Dynamics GP to help us."

### **Benefits.**

Wingspan is already starting to experience a variety of tangible benefits from implementing Microsoft Dynamics GP business intelligence solutions.

#### *Confident decision making.*

With the additional functionality of Microsoft FRx® Forecaster, Wingspan can gather accurate information and make timely and better informed decisions. State-of-the-art budget and forecasting capabilities guided Wingspan's decision to add this solution to their tool set. Often, with very short lead-times, Wingspan has to put budgets together from as small as US\$100,000 up to several million dollars. They needed a flexible tool that could give them solid financial data and be up-to-date with their latest human resource information. "We just weren't getting there with a spreadsheet model. I'm really looking forward to having this application fully implemented," says Browne.

#### *Improved planning.*

Wingspan is also in process of implementing Microsoft Sarbanes-Oxley (SOX) Accelerator which is included with the Microsoft Dynamics GP Business Intelligence Layer. Non-profit organizations are not currently required to follow SOX, but they anticipate that this may change in the near future and find that many of the requirements make solid business sense. "From a best-practice standpoint, it makes sense to follow the spirit of SOX, so, we look forward to utilizing Microsoft Sarbanes-Oxley Accelerator to help us along the way," comments Browne. Wingspan is accredited by three national crediting bodies. Using Microsoft SOX Accelerator, they plan to move volumes of licensing and policy procedures into electronic format, significantly reducing the time spent gathering information for the accreditation process.

#### *Tighter strategic alignment.*

To handle funding requirements, Wingspan is adopting Analytical Accounting for Microsoft Dynamics GP to help them better align the tactical day-to-day work with the strategic objectives of the organization. Achieving these objectives requires consolidating the data currently spread throughout the organization in spreadsheets. "Now with both SmartList Builder and some of the other enhancements to the core applications and [Microsoft Office] Excel®, we're going to be able to streamline our analytical activities."