

Success story

Sage Intacct Drives Efficiency for First Nations Communities



The challenge

Keewaytinook Okimakanak struggled with inefficient, paper-intensive financial processes, manual reporting, and outdated systems that hindered their operations.



The solution

They migrated from Sage 50 and Sage 300 to the cloud-based Sage Intacct, implemented by BAASS, to modernize and streamline their financial management.



The result

Keewaytinook Okimakanak gained improved efficiency, time and cost savings, enhanced reporting, and greater control, allowing them to focus on strategic decision-making and better serve their communities.



“BAASS experience with nonprofits and Indigenous communities is invaluable to us – they understand how we work and how to help us work smarter.”

Mandy Card
KO's Financial Controller



Organization
Keewaytinook Okimakanak (KO)
Location
Northwestern Ontario
Industry
Non-Political Chiefs Council
Sage Partner
BAASS Business Solutions



Keewaytinook Okimakanak (KO)

Keewaytinook Okimakanak (KO), a non-political Chiefs Council representing six First Nations communities in Northern Ontario, is known for its leadership in delivering innovative solutions to remote communities. From public works to telecommunications and education, KO's forward-thinking approach ensures its communities stay connected and thrive. To continue driving these initiatives with precision and efficiency, KO modernized its financial operations with Sage Intacct.



Future-proofing financial operations

Recognizing the need for a more modern, cloud-based financial management system, KO made the decision to migrate from Sage 50 and Sage 300 to Sage Intacct, which offered a future-proof solution for their multi-entity operations.

While the older applications continued to perform, KO's small finance team spent too much time switching between applications, manually preparing reports, and managing approval workflows. "Overall, our processes were too cumbersome, too paper-intensive, and too inefficient," recalls Mandy Card, KO's Financial Controller. "Another catalyst for change was the fact that our server was out of date — an expensive fix. Migrating to a cloud-based solution solved that problem, too."

Mandy says the organization quickly zeroed in on Sage Intacct as its next-generation financial management solution. "Sage Intacct offers everything we were looking for. We performed a cost-benefit analysis of moving to the cloud, and Sage Intacct was the winner."

Skilled implementation

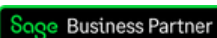
Mandy describes the migration to Sage Intacct as straightforward. "BAASS worked closely with me and our IT manager to transfer our data out of Sage 50 and Sage 300 and into Sage Intacct," she says.

BAASS also developed an integration to connect Sage Intacct with Square, a leading point-of-sale application used by one of KO's affiliate organizations. "K-Net provides internet and telecommunications services in the community," explains Mandy. "They operate retail outlets that use Square. Using the BAASS Bridge, we can bring revenue data from K-Net into Sage Intacct. Before, this was an entirely manual task."

Effortless audits and accountability

With Sage Intacct, KO gained enhanced visibility and control over its financial processes. The platform's robust audit trail feature ensures that every transaction is tracked, providing clear accountability and transparency. With configurable, automated purchasing approval workflows, KO can easily manage approvals and keep operations running smoothly.

Importantly, Sage Intacct has given KO increased confidence during its annual financial audit, with the ability to provide auditors direct access to the application to review detailed records, ensuring full compliance with audit requirements. "Our auditor even told us that our system was their favorite because of the comprehensive audit trail and how simple it was to find the information they needed," notes Mandy. "We've completed one audit cycle under Sage Intacct and feel confident we can shorten the cycle and perhaps save on audit fees going forward."





Enhanced reporting for smarter decisions

With Sage Intacct, KO has transformed its financial reporting. What used to be a cumbersome, time-consuming process of consolidating financials across entities now happens with just a few clicks. Additionally, Sage Intacct's dimensions enable real-time, focused reports for department heads and fund tracking, vital for meeting government reporting requirements. This newfound efficiency empowers KO to manage projects, funds, and departments with ease and precision. This efficiency has freed up valuable time for the finance team, allowing them to focus more on strategic decision-making than data compilation.

Additionally, KO leverages Sage Intacct's dimensions to create customized, focused reports for department heads, informing them of their financial standing in real time. "Previously, we had to prepare each of these reports and then upload them to a shared drive for the department heads to view," explains Mandy. "It involved a lot of effort, and the reports were instantly outdated. Now, they have current information they use to keep their projects and initiatives on track and within budget."

Sage Intacct dimensions also enable KO to track projects and specific funds, which is critical for reporting to government funding agencies. The ability to easily break down financials by project, fund, or department has made compliance and reporting much more streamlined, giving KO the insight and confidence needed to manage its financials with even greater precision.

Realizing a strong return

KO is already seeing a solid return on investment with Sage Intacct. The organization is realizing significant cost and time savings by eliminating the cost of licensing, maintaining multiple other applications and an on-premises server, and streamlining workflows with automation. Despite its growth, it hasn't needed additional financial staff, positioning the organization for a strong ROI as it scales efficiently. What advice does Mandy have for other Indigenous organizations facing similar challenges to those KO faced? "I'd tell them to take the leap — you won't regret it! And be sure to engage a committed business partner like BAASS — they make all the difference."

Expanding capabilities

Following its successful migration to Sage Intacct, KO plans to implement the Sage Fixed Asset application to streamline asset tracking and depreciation calculations. The deep integration with Sage Intacct means no duplicate data entry, and it also makes it simple to include asset information in the organization's financial reports. "Our property management division is a growing part of our operation," Mandy explains. "Sage Fixed Asset will simplify tracking our buildings, land, and other assets."

Partnership creates strong foundation

For Mandy, Sage Intacct has been a game-changer. It's given her much more flexibility in her workflow, allowing her to seamlessly manage internal processes and approvals, even while working from home. She can easily meet deadlines while also focusing on higher-level projects like strategic planning, forecasting, and budgeting. With Sage Intacct, Mandy has the tools she needs to stay efficient and forward-thinking in her role.

Mandy is quick to credit the team at BAASS for their strong leadership and project management skills. "What sets BAASS apart is their level of care and commitment," she says. "Implementations can be stressful, but BAASS was prepared, skilled, responsive, and proactive. They worked to engage our team and provided the training they needed to be productive. Their experience with nonprofits and Indigenous communities is invaluable to us — they understand how we work and how to help us work smarter."

Every step KO takes to optimize its financial operations directly supports its mission to serve and uplift its communities. By embracing Sage Intacct, KO is building a foundation that allows them to invest more time and resources where they matter most — on the ground, helping people.

