

Success story

Senior living community reinvigorates back office technology

A move to Sage Intacct helps Toronto's Nisbet Lodge automate nearly every manual process

“We’ve shifted away from transactional work and into more strategic work. That benefits the organization and our employees.”

Dennis Donovan, CGA, CPA
CFO, Nisbet Lodge



The challenge

The organization was growing and required more scalability, automation, and reporting capabilities than Sage 50 could provide.



The solution

Its long-term success with Sage solutions built a trust factor, that when combined with the solution's capabilities, led Nisbet Lodge to select Sage Intacct as its next-generation financial management solution.



The result

By migrating to Sage Intacct, Nisbet Lodge is driving cost-saving efficiencies throughout its finance department.

- AP automation saves two days labor per week.
- Supporting growth without adding to the administrative headcount.
- Organization expects to automate 99% of all manual processing tasks.
- Saving 40 hours during the annual audit cycle.



Organization
Nisbet Lodge

Location
Toronto, Canada

Industry
Nonprofit

Sage Products
Sage Intacct

Sage Partner
BAASS Business Solutions



About Nisbet Lodge

Nisbet Lodge is a charitable, faith-based nonprofit organization that is home to just over 165 seniors at any given time. They offer residents accommodation and care that fulfills their needs in a compassionate, Christian environment.



Playing a part in history

Toronto's Nisbet Lodge is a faith-based nonprofit senior care community providing a welcoming, friendly, and compassionate home to 165 individuals. The organization's mission embraces the physical, recreational, emotional, and spiritual needs of every individual in its care. While its commitment to care has never changed, Nisbet Lodge's financial and accounting demands have grown increasingly complex. That's why Nisbet Lodge made the transition from Sage 50 to Sage Intacct.

Nisbet Lodge used Sage 50 for years, but as it grew, it needed additional scalability, flexibility, automated workflows, and financial reporting capabilities to thrive in a changing marketplace.

"I've worked with the same Sage business partner for the past decade," says Dennis Donovan, Nisbet Lodge's CFO. "Together we decided that Sage Intacct was the best next step for Nisbet Lodge. They've helped us implement the software and optimize it for the best results. Overall, it's been a tremendous success."

Automated workflows eliminate 99% of manual tasks

"We're working to eliminate all the redundant, manual tasks — replacing them with automated workflows in Sage Intacct," Dennis says. "Ultimately, we believe we can eliminate up to 99% of the manual work we were previously tasked with."

Already, Sage Intacct AP Automation is saving the organization two full days of employee time per week. "We recently had some turnover in the finance department, and thanks to the efficiencies we've gained, we don't think we'll have to hire to replace those roles," Dennis adds.

Resident billing once required a set of spreadsheets to perform the necessary calculations before the data was keyed into the accounting software. Now, Nisbet Lodge has configured Sage Intacct to automatically generate invoices, send them electronically, and even record EFT payments. "Billing is now almost entirely automated," says Dennis. "This saves hours each month and ensures a higher degree of accuracy."

Another largely manual task Nisbet Lodge has automated through Sage Intacct is recording payroll transactions. "It used to take us a full afternoon each pay period to create the journal entries," Dennis notes. "Now we import the data into Sage Intacct from ADP, which takes just three minutes."

Data accessibility speeds audits

The Sage Intacct cloud-native architecture is a proven advantage for the organization. "Our finance team can work from anywhere," Dennis explains. "Plus, we scan and store all paper documentation within the application, so it's accessible to anyone who needs it."





Nisbet Lodge expects that by using Sage Intacct, it will ultimately be able to automate over 90% of its manual processes.

Nisbet Lodge shares access to Sage Intacct with its auditors, which saves Dennis a significant amount of time. “Previously, I had to be available to the auditors throughout the process to track down supporting documents,” he says. “Now, they’re all in Sage Intacct.” Dennis estimates that providing the auditors with self-service access saves him 40 or more hours during each audit cycle.

The time-saving convenience also applies to completing the reports required by the City and Ontario’s Ministry of Long-Term Care. Customized reports in Sage Intacct provide the information needed to complete and file them.

Cost savings contribute directly to the bottom line

Margins are notoriously slim in the senior living space, making it essential for managers and their boards to have accurate, real-time insights into financial performance. “Nisbet Lodge is profitable now, but that wasn’t always the case,” Dennis reports. “Before, all we had to rely on were bottom line numbers — we had no way of knowing the what and the why behind those numbers.

For example, the organization knew what it spent each month in payroll costs but wasn’t able to report on where and how those payroll dollars were being spent. “With Sage Intacct, we’ve been able to bring in non-financial data such as contractor versus staff hours and costs,” explains Dennis. “That helped us uncover that we were too reliant on agency staffing, which cost the organization too much. We were able to hire more permanent staff and dial back the agency usage, dramatically reducing our payroll costs.”

Another example of the cost savings Dennis attributes to its newfound data visibility surrounds vendor relationships. “We had been using an outsourced property manager to handle some maintenance tasks,” he says. “When we dug into the numbers, we saw that it was costing us much more than hiring the maintenance done ourselves. We brought those tasks in house and got spending firmly under our control.”

Maximizing revenues while minimizing costs

Canada’s long-term care providers receive a fixed per diem for each individual under their care. There are few additional services providers can bill for — making cost control a top priority. “A further complication is that we must demonstrate that the full per diem is spent on care, or we have to return it to the government,” explains Dennis. “This means we must diligently track expenses to optimize every dollar in funding we receive.”

To achieve this goal, Nisbet Lodge strategically uses Sage Intacct dimensions. The organization configured dimensions to help it track spending in a highly detailed fashion. For example, it maintains a dimension for IPAC (Infection Prevention and Control), customer, vendor, employee, funding source, and more. “The detailed tracking is essential for our compliance reporting, but it also provides us with quick access to our spending levels throughout the month,” says Dennis. “We’re now out in front of these numbers instead of playing catchup during month-end processing.”



“By eliminating the time we spent entering and reentering data and performing manual processes, we’re able to focus our talents on best practices improvements and other initiatives to keep the organization financially healthy to support our mission.”

Dennis Donovan, CGA, CPA
CFO
Nisbet Lodge

Integration with healthcare industry application

Nisbet Lodge is also leveraging the value of non-financial or statistical accounts in Sage Intacct to track key metrics such as resident days. “We must maintain a specific occupancy rate to receive funding, so tracking this information is essential,” Dennis explains. “The data comes from our PointClickCare healthcare application. We bring it into Sage Intacct and can include it in our financial reports and the reports we submit to the government. All of this was done manually in spreadsheets before Sage Intacct.”

Strong ROI for a data-driven organization

Senior living is a data-driven industry, and Sage Intacct delivers the data. “It helps us run more efficiently, so we can keep our administrative staff small and put more funding into care,” notes Dennis. “We’ve shifted away from transactional work and into more strategic work. That benefits the organization and our employees.”

He concludes, “Nisbet Lodge is certainly experiencing a strong return on its investment in Sage Intacct. By eliminating the time we spent entering and reentering data and performing manual processes, we’re able to focus our talents on best practice improvements and other initiatives to keep the organization financially healthy and support our mission.”



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