itk In The Know
Solutions Group

ITK Success Story:
NONPROFIT EMBRACES INTEGRATED, BEST-OF-BREED APPROACH

ITK Solutions Group partnered with a Nonprofit, humanitarian aid organization to leverage Unit4 ERP to help them track contributions and field project expenses, and overall have a more complete financial and operations picture.

CHALLENGES

The customer's current ERP software was an older, on-premise solution that was "sunsetting" and would no longer be supported in a matter of months.

The legacy system also did not integrate with their newly selected best-of-breed logistics and CRM software systems. It was important that these systems all "talked" to each other, so data could be leveraged to make better business decisions. The customer wanted to track donations, expenses and activities out in the field (the last mile to aid recipient). They also wanted improved visibility into online and offline revenue transactions to improve the customer experience.

Lastly, multiple partners were involved, which can sometimes lead to sub par communication and collaboration.

SOLUTIONS

ITK leveraged Unit4's Nonprofit model, an expedited approach based on best practices for nonprofit organizations, in concert with ITK's own template approach methodology, to reduce both the length and cost of the project. The customer opted for a best-of-breed approach, leveraging their newly selected logistics software (to track inventory numbers), a new CRM platform (to track contributions and other revenue) and Unit4 ERP to track and report all financials (expenses and revenue) by project, locations and funds, etc.

> "It was important to track transactions in the field - the last mile to aid recipient."

> "Unit4's Nonprofit Model combined with ITK's template approach provided a faster, more efficient implementation reducing the length and cost of the project."

RESULTS

Unit4's Nonprofit Model, along with ITK's knowledge of accounting, the nonprofit vertical, business process expertise, and history of implementing and using Unit4 ERP allowed for a rapid implementation saving the customer time and money.

ITK often works on projects with multiple partners, so it was second nature to work closely and collaboratively with the other teams, to keep the projects organized, and on time.

Unit4 ERP enabled our customer to seamlessly connect their best-of-breed logistics and CRM software. This allowed for better utilization of data that had previously been stuck in separate software systems and spreadsheets. And, in turn, helped the organization to become more efficient by pulling valuable data together to improve customer service and provide a more complete financial and operations picture allowing for more informed business decisions.

+ **Go-live in six months**

+ **Nonprofit model reduced project timeline and investment**

+ **Timely delivery of online orders**

+ **Accurate inventory levels online improved customer experience**

+ **Cloud software makes working virtually much easier (as software is no longer on-premise)**

Does your Nonprofit or NGO have trouble tracking contributions, grants and awards, or looking for a more complete financial and operations picture?

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