

# Non-profit selects modern ERP system to replace outdated ERP system.

## CLIENT OVERVIEW

The organization was founded in 1981 as a nonprofit, tax-exempt 501(c)(3) organization. Generous supporters and volunteers make it possible to . . .

- Distribute food, clothing, medicine and seeds, mostly to needy orphans and Christian families.
- Reach out to people in material poverty and help them provide for themselves through self-help resources, microloans, savings groups, agricultural programs and Christ-centered teaching.
- Print and distribute Bibles, Bible story books and other Christian literature for believers and non-believers around the world.
- Clean up and rebuild for survivors of natural disasters in the US.
- Help victims of war, famine and natural disasters around the world.
- Provide alternative places of employment for conscientious objectors to serve should the US activate a military draft.
- Install Gospel billboards along America's major highways.
- Support church planting efforts outside the US.
- Operate medical clinics outside the US.

## HOW THE CLIENT OPERATES

This organization does not just encompass a non-profit organization but also encompasses a for-profit company that has a different fiscal year. As such, the organization must focus on tracking, reporting and financial record keeping – including tracking grants and gifts from contributor to the end-product or support delivered.

The diverse verticals that exist in this organization include manufacturing, assembly, shipping (including international with containers and export requirements), publishing, point of sale needs, fleet management, contract management and project management.





## CLIENT CHALLENGES

The organization had many manual and Excel-based processes because of their limited and outdated ERP system. They recognized inefficiencies and inaccuracies caused by the system, and they wanted a single ERP system with a single source of truth. While there were multiple ancillary systems, much data was kept in Access databases or Excel spreadsheets.

## OUR APPROACH

Panorama assisted the client in its ERP selection process, which included work to streamline business processes. After the initial planning, Panorama collected 400 business requirements at two different facilities, representing the organizations headquarters and its primary manufacturing and distribution site.

These business requirements centered around several goals:

- To automate and increase efficiencies within the organization
- To replace the outdated ERP platform with newer technology
- To provide remote locations with access or input to a more centralized system
- To provide better insight into inventory and reporting
- To enable the organization to better serve those in need in a more efficient manner at the lowest cost possible.

The organization needed an ERP system that could address its critical business functions. The ERP solution had to be able to go beyond traditional ERP capabilities and include the following modules and functionality:

- Flexibility in warehouse and inventory management
- Central management of donor management
- Flexibility in procurement, vendor management and cost tracking
- Flexibility in production (project management and volunteer tracking) capabilities
- Integrated donor relationship management platform
- Finance and accounting management, including 990 information and budgeting process
- Non-profit fund accounting
- Point of sale technology for their for-profit practice
- Configurable external portal capabilities (e.g. for donors or management)
- Dynamic workflow capabilities (with a focus on audit trail functionality)



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BARCODING AND SCANNING WITH MOBILE AND OFFLINE TECHNOLOGY WERE OF KEY IMPORTANCE FOR SOME OF THE REMOTE LOCATIONS AND IN THE WAREHOUSE. ULTIMATELY, THIS WAS VIEWED AS AN ENABLEMENT PROJECT FOR THE ORGANIZATION.

## SELECTION RESULTS

The organization was aware of the variation in their business verticals and understood that a best-of-breed approach from a system perspective was probable. Therefore, Panorama assisted the client with a selection model that ultimately led to the selection of Infor Donor Direct, Unit4 UBW and Helm as the preferred vendor solutions.

With Panorama's assistance, the organization completed a proof of concept implementation project for its for-profit, retail book business.

## IMPLEMENTATION RESULTS

The implementation of Donor Direct, Unit4 and Helm for the organization's for-profit subdivision has resulted in the following benefits:

- Proof of concept for the entire global organization
- Increased flexibility in procurement, vendor management and cost tracking
- Improved finance and accounting management
- Increased flexibility in warehouse and inventory management, including . . .
  - Product master data management
  - Dynamic inventory costing and pricing capabilities
  - Configurable inventory picking, packaging and cycle count capabilities
  - Dynamic inventory and warehouse code and attribute capability
  - Management of cataloging of SKU