



## CASE STUDY SERIES

### **Baptist General Convention of Texas Profile**

- Non-profit headquartered in Dallas, Texas
- 120 years of history
- Cooperation with 80 local Texas Baptist associations and 5,700 local churches
- **100 users** of XLERANT's BudgetPak
- About 2,000 project budgets created per year

### **BudgetPak Results**

- Ability to quickly and easily create up to **2,000 project budgets**
- Implementation time of **one month**
- Dramatic increase in the number of **realistic budgets** submitted in **first pass**
- Training time of only **45 minutes** on average
- Users now enjoy budgeting and are fully invested in the process

### Summary

*"The best way to sum up our experience with BudgetPak is that our users have actually expressed excitement at using the application," says Jill Larsen, CFO of BGCT. "If you would have told me our users would have been excited with anything to do with budgeting, I would have never believed it."*

*XLERANT's BudgetPak completely overhauled a budgeting process that was painful, problematic and lengthy. With a quick implementation period and training cycle, users are now willing participants in the creation of the budget; and the number of realistic budgets being submitted in the first pass has increased dramatically.*

### Background

The Baptist General Convention of Texas is a non profit organization that relates to thousands of churches with headquartered in Dallas, Texas. The existing method of budgeting, which relied heavily on Excel, was very time consuming and unwieldy. This led to lengthy budget cycles and low levels of enthusiasm from participants. The implementation of XLERANT's BudgetPak has dramatically improved the budgeting process. The end result is much faster and more accurate budgeting, with active participation from the entire organization.

## **Overview of Baptist General Convention of Texas**

With over 120 years of history, the BGCT's mission is to encourage, facilitate and connect Baptist churches within the state. About 80 local Texas Baptist associations and 5,700 local churches cooperate with the Baptist General Convention. The Convention's offices are located in Dallas, Texas, though convention staff is located across the state. The BGCT also has affiliations with over 20 state institutions.

## **The Problem**

The annual budgeting process for the BGCT is a lengthy process beginning in June or July of each year. Individual budget managers receive budgets, which center directors then need to approve. From there, budgets are forwarded to team directors for approval as well as executive approval. The process culminates at the annual meeting around the first of November where the budget is voted on and ratified by its elected messengers.

All told, about 100 staff members develop center budgets, which are then consolidated. The majority of those staff members are not experts in Excel, nor do they have formal accounting or budgeting training.

The project concept is core to how the BGCT manages their ministry business, in fact, BGCT budgets approximately 2,000 projects in a given year. This makes budgeting complex and demanding.

The original process relied on Microsoft Excel to create spreadsheets for the prior year's budget. Although relatively easy to input numbers into, many participants still had a difficult time with Excel when it came to writing formulas, executing commands, inserting columns and rows, and linking spreadsheets. Furthermore the limitations of Excel were glaringly obvious for certain needs; populating data from payroll providers was difficult as were integrating the prior year's actuals and budget.

BGCT experienced one "false start" before finding X Lerant's BudgetPak. They hired a programmer to create a custom application based on the Microsoft Access database program. Unfortunately the end product was cumbersome and confusing. Generating reports was next to impossible, as was getting approvals from the different management levels. A lot of manual effort was needed to move data from the Access program to the financial software, and users lost the flow of their work due to the distinct nature of the two programs. The overwhelming sentiment was one of discontent for the new Access-based budgeting system.

"We knew that we needed to do something different," says Jill Larsen, chief financial officer for the BGCT. "A better solution had to be found for our budgeting process. The status quo simply was not acceptable."

## **The Search for a Vendor Begins**

A team was created to find the right corporate budgeting software for their needs led by Larsen, Dave Lyons, director of information technology; and Dee Boyd, general ledger manager. The team initially contacted a major IT research firm for suggestions. From their references and BGCT's own research, a short list of five (5) corporate budgeting solutions was created. A one page summary of BGCT's needs was created for vendors. Demos were arranged in short order as BGCT was on an extremely tight timeline.

Upon review of the short-listed budgeting solutions it was clear that none of them provided the right balance between the required advanced budgeting features and usability. “In fact all of the solutions retained a look and feel similar to Excel, which in many respects would just bring BGCT back to where it started from, and would not go over well with end users.” According to Lyons.

The team at BGCT came across XLerant’s BudgetPak system from their online search. At first glance, BudgetPak seemed to provide everything they needed. An invitation was extended to XLerant to participate in the vendor selection process. As the BGCT team went through the demo and their list of questions, the excitement grew. It seemed that BudgetPak provided all the functionality they needed in an interface that was intuitive and logical. BudgetPak used plain English that even non-financial users would be able to understand.

The final decision was made to award the contract to XLerant’s BudgetPak.

### **Rapid Implementation of XLerant’s BudgetPak**

Implementing BudgetPak was amazingly simple and straightforward for a product that touched on so many different areas of the organization. From the outset the staff at XLerant provided full guidance and communicated openly with the team at BGCT. Potential issues were addressed up front after detailed discussion on BGCT’s budgeting needs. Implementation went off without a hitch and avoided any major technical issues.

Total implementation time; with 100 users budgeting for 2,000 projects, was only one month.

### **Benefits Realized**

1. **Increased number “realistic budgets” on first pass.** BGCT experienced a dramatic increase in the number of budgets submitted in the first pass that were reasonable, realistic, and defensible. Dee Boyd, the General Ledger Manager at BGCT commented “The fact that we told managers to keep the budget to last year’s level, and they could see right on their screen how they were tracking to that goal as they developed their budgets, was key. BudgetPak also made it easy to manage by exception, as managers used the tool to build discrete projects or add line item detail or commentary to defend their budget requests.”
2. **Powerful but easy project budgeting (for some 2,000 projects).** The major benefit of using BudgetPak for the BGCT is the ability for 100 users to create and manage budgets for up to 2,000 projects. BudgetPak has scaled up comfortably according to their needs. Users of BudgetPak were excited at the ability to see the impact of all their salary and benefit decisions on the different strategic initiatives.
3. **Amazingly intuitive user interface.** “The look and feel of BudgetPak is such that someone who has very little experience with technology can dive right in and be comfortable using the product in very little time,” says Dave Lyons. “As an example, with BudgetPak you know when you have completed a section. The product has big green check marks to indicate that a section has been completed correctly.”

4. **Painless End User Training.** In fact, BudgetPak required no more than 45 minutes over a web demo for BGCT users. More amazing; considering the problems with previous methods, there were no objections raised by the user base.
5. **Powerful Reporting without additional consulting costs.** BudgetPak offers an extensive library of the most common reports as well as the ability to create custom reports. Indicators in the reports highlight discrepancies and point out areas that need attention. Users can add in ad-hoc notes to make comments within reports. For users who are comfortable with Excel, BudgetPak includes a one-click export to Excel.
6. **Reduced “timing variances” through smart seasonality.** As Dave Lyons noted “Particularly for the IT department, BudgetPak helps me figure out to which months to apply our software maintenance expenses which are a significant part of our IT budget.”
7. **Easy and intuitive staff budgeting.** “Managing our staff budget has become a breeze with BudgetPak,” notes Lyons. “We can quickly and easily manage issues such as employees opting out of Social Security taxes or when temporary employees or interns leave the organization. BudgetPak’s graphics are viewable in various formats depending on your needs.”
8. **Full flexibility for BGCT budgeting needs.** From little touches such as the ability to increase or decrease amounts by either percentage or dollars, to large areas such as headcount management, everything BGCT needed was there. Users could leave the program midway through a process and resume from where they left off at a later point in time. Particularly helpful was the ability for multiple users in the same department to work on different parts of a budget simultaneously.

As CFO Larsen observed, “In the end we wound up with better budgets, faster, which is exactly what our goal was.”

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**For more detail on this application or to discuss how XLerant can help you with your analytic requirements, send an email to [Info@XLerant.com](mailto:Info@XLerant.com).**

#### About XLerant

XLerant helps companies save time and add strategic value to their budget process by moving from accounting-centric to business-centric budgeting. XLerant's award-winning BudgetPak software redefines Financial Planning & Analysis (FP&A) by guiding business managers through the process of building their budgets while providing financial managers a powerful front-end to any existing G/L, CPM, or ERP system. Hundreds of business managers are now engaged in budgeting in a very powerful new way.

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