

Susan G. Komen for the Cure Leverages PeopleSoft Implementation to Improve Operational Efficiencies

Client Background

Susan G. Komen for the Cure (Komen) is the world's largest grassroots network of breast cancer survivors and activists fighting to save lives, empower people, ensure quality care for all and energize science to find the cures. Komen is headquartered in Dallas, TX and operates 122 decentralized Affiliate offices across the country. As Komen grew into a large and complex global organization, it had become increasingly difficult for managers to close year-end financials in a timely manner. The existing platform of independent instances of QuickBooks for each of their 122 Affiliate offices and Solomon Financials for headquarters made consolidated financial analysis a cumbersome task and resulted in a year-end process that would take as long as five months to complete. In addition to the issues stemming from independent repositories of financial information, the decentralized Affiliate offices were processing most of their own financial transactions which took time away from their mission activities. Further, the consistency, timeliness and accuracy of the financial processing often suffered due to volunteer turnover.

Software Evaluation and Selection

In late 2007 / early 2008, Komen started a process to identify an enterprise financial system that would help them address challenges with their existing systems. Komen's potential set of solutions included Lawson, SAP and Oracle (PeopleSoft). After an extensive evaluation, Komen selected PeopleSoft 9.0 as its ERP solution (General Ledger, Accounts Payable, Accounts Receivable, Expenses, Project Costing, eProcurement and Cash Management).

Solution Implementation

Komen's first step was to implement PeopleSoft Financials at its headquarters office, which has a higher volume of users than the individual Affiliate offices. The team also solicited a few Affiliate offices who volunteered to go live on PeopleSoft as a pilot test group. Implementation goals were to: 1) keep it simple and limit customizations, 2) stay on time and on budget, and 3) get it right at headquarters and the pilot offices since the PeopleSoft processes would eventually be deployed to all Affiliates. The headquarters' rollout was completed on time and under budget.

According to Ria Williams, assistant controller, the implementation was more complex than initially anticipated, "PeopleSoft gives you a lot of options for customization, and you really have to understand the implications of your decisions. We really relied heavily on the expertise of the eVerge Group consultants. They asked the right questions to make sure we reached the end goals we were looking to achieve."

eVerge Group's PrecisionFit implementation methodology was another key to the success of the project. A critical element in the PrecisionFit methodology is iterative prototyping, which is a process where an initial system prototype is developed and then iteratively adjusted based on test group participants' use of the system. According to Williams, "We had only one dedicated staff member on the project; the rest were trying to contribute on top of their everyday jobs. Through the iterative prototyping process, we were able to derive and incorporate team member feedback quickly into each iteration of the design. This process helped us to be very efficient in the use of staff members' time."



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ERP project profile



Industry: Not-For-Profit

Oracle Applications:
PeopleSoft Financials 9.0



"2010 Oracle Titan Award" for
Financial Management Solution

Client Feedback:

"eVerge Group immersed themselves in our operations and took the time to really understand the implications of each implementation decision. They truly were a partner and we really felt they cared about the success of the project."

Ria Williams, Assistant
Controller, Susan G. Komen
for the Cure

"eVerge Group really was our partner all throughout the project. The eVerge consultants were very committed and became part of the team. I never thought of them as contractors... just part of the team."

Sam Cheng, Controller,
Susan G. Komen for the
Cure



After a few months of supporting the initial phase of the rollout at headquarters, the team began the implementation of the application throughout the remaining Affiliate offices. The key to the successful implementation of the Affiliates was to segregate each Affiliate into one of three tiers based on size, complexity and staff skill levels. Specific timing, functionality, training and back-office support was then developed and executed specifically for each tier.

Results

The new financial accounting system has enabled Komen to more efficiently process transactions across its distributed network of Affiliates, enabling them to direct their attention away from administrative tasks and focus more of their resources on fundraising and granting initiatives. The PeopleSoft solution has improved forecasting, cost, and purchasing controls, and it has made the reporting more robust and procurement more streamlined. Komen for the Cure's financial organization is now able to fulfill payments to vendors in less time and better monitor its internal expenses.

Operational Efficiencies – Rather than maintaining their own accounting system, Komen Affiliates now simply have to enter their invoices into a standard invoice entry screen to be processed in real time, or they can send their invoices to headquarters by e-mail, fax, or snail mail, and the accounting department will enter them into the system. The PeopleSoft system enables the Affiliates to receive reports, set up vendors and make accounts receivable and accounts payable entries.

More Timely Information Leading to Better Decision Making – The new PeopleSoft ERP system has allowed Komen to reduce the year-end close process from five months to just two and a half months. Whereas the process used to involve the accumulation and consolidation of spreadsheet data from each Affiliate, all financial transactions and balances are consolidated within the PeopleSoft application. This process has enabled tighter financial controls and has significantly reduced errors – both contributing to more efficient financial audits.

“The year-end close process that used to take four to five months will be reduced by at least 50 percent. We've similarly significantly reduced our month-end close process time,” said Justin Ricketts, CIO. In addition, he said, the PeopleSoft application is “enabling Komen to give both internal and external auditors the key data they need very, very quickly and easily. It currently takes nine months from the close of our fiscal year to produce final audited financials. That time will be reduced by at least 50 percent with PeopleSoft.”

More timely information coming out of the PeopleSoft system has also led to improvements in operational decision making. Before the new system, it was very difficult for headquarters to assess the performance of the individual Affiliates until the books closed. Now monthly information, as well as initiative-level information, is available on a much more timely basis. This information gives the headquarters' staff an opportunity to more proactively work with those Affiliates that are falling short of goals. It also allows Komen to better determine the amount of money that they will be able to grant throughout the year. According to Sam Cheng, Komen's controller, “The new system provides us with more timely and accurate information on our Affiliate operations. Additionally, it enables us to better measure the effectiveness of individual fundraising initiatives and make better granting decisions throughout the year.”

“Oracle’s platforms are allowing us to more effectively interact with one another. We have real-time reporting and revenue tracking and increased efficiency in the back office. The more we can streamline revenue and reporting functions and ensure that our time is freed up to work on the social health and awareness needs of our constituents, the more we’re able to deal directly with the issues that affect women right where they live. This helps us ramp up our per-employee, per-volunteer efficiency and gives us a connectivity that we could never have without this kind of platform and technology. And that’s really how technology is supposed to work for our organization. It frees us up and multiplies our time spent on our mission.”

Nancy Brinker, CEO and Founder, Susan G. Komen for the Cure



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