

Customer success story
Community Based Support
South Inc

Industry 
Health Services 
Not for Profit

Location
Australia

Greentree product suite
Financials
Job Costing
eReporting
Payroll

COMMUNITY BASED SUPPORT ACHIEVING A NEW MAXIMUM CONTROL



An interdependent community where all people can participate to their potential and achieve maximum control of their lives is the vision of Community Based Support South Inc (CBS), which provides in-home and community-based personal support and respite care for frail older people, people with a disability and their carers in Southern Tasmania.

Mark Donnelly, Personnel & Finance Manager, also recognised the need to get maximum control of the organisation internally with an upgrade to Greentree's business management suite. After using Attaché, a Windows-based accounting package, for a number of years, it was becoming increasingly clear that they were outgrowing it. "Attaché was not coping with what we wanted to achieve. We had no sense of the future direction of the product development and we lacked good local support," he says.

"There was also a lack of reporting facilities to cope with the volume of internal and external reports we need to produce. We had to decide whether to persevere with this system, although the reconfiguration would have cost nearly as much as a new system. Basically it was time to look at the marketplace."

The management team considered a range of low to higher-tier products which offered reliable local support. Mark explains, "During our product review, a colleague recommended CBA. We did a little research and found Greentree was the newer, Windows-based product from the same developer. We looked into it,

as we knew it would be OK because of its CBA past. We also had existing links with the local Greentree support team." Greentree positions itself as offering the mid-market organisation a product with functional capacity beyond any of its competitors with equivalent pricing. After their evaluation, CBS felt Greentree was a cost-effective solution for their not-for-profit organisation.

"We believe there is a void between the basic accounting packages and the higher-tier systems in terms of price and functionality. We looked at the likes of MYOB, which were too small for our business, and SAP Business One. Greentree is a big step for our size of organisation. Greentree won on effectiveness and cost, and still offered good growth potential. It also offered the flexibility of getting information in and out exactly how we wanted to."

CBS has a large and complex client database built in Access, which it needed to retain in the mid-term. The new system would have to integrate seamlessly to this Access database. "Integration between Attaché and Access was cumbersome and fraught with danger. Greentree seems to cope fine with every scenario we have in our organisation," says Mark.

Very very integrated

The locally-based Greentree Business Partner recently adopted Greentree as its product choice to provide 'end-to-end' business solutions and has quickly gained momentum and expertise. "I would like to thank the team for their support



and assistance with the implementation. We were their first Greentree client, and their consultants' rapidly increasing knowledge and skills with Greentree is a testament to their skill and ability. The trust my team place in them is also testament of the high quality of their team."

Mark continues, "Our team is happy with the change. They are really responsive and helpful, and quick to act on our feedback too." Post-implementation they are able to take stock of their Greentree experience. "I believe Greentree will deliver more than I expected and will see CBS through for the next decade of possibly similar growth to that experienced over the last decade. We are happy with the responsiveness of the product. The package upgrades are dead easy."

Very, very, flexible!

CBS has a Board of Management of nine drawn mainly from its consumer base. To be more accountable to its stakeholders, CBS implemented Greentree's Financial Management suite, Job Costing and Payroll modules. Greentree's Job Cost module helps provide an effective system for managing jobs, including complete tracking of costs and revenue against jobs, and entry of timesheets and disbursements. Information can be entered against jobs from the Financial and Payroll modules, providing comprehensive and immediate control over costs and revenue. Mark explains, "As a not-for-profit organisation, we need to control expenditure and

better manage sales and services. We needed a system to provide this information to control costs down and run more efficiently."

Payroll for Greentree has helped streamline a range of time-consuming, manual tasks to process over 1200 timesheets a month and pay CBS's 200 employees. Each of its 170 field staff submits a timesheet per client which is now captured in their roster, then the entire payroll, jobs and billing data is entered directly into Greentree via Excel. "It used to take four people three days to process payroll using Attaché, plus three days afterwards to process allocations and then another week to manually enter invoices. Greentree is a big improvement, reducing the processing time to just two days for two people. We can automatically update the information into the system, which we could not do before. Life is a lot easier now," explains Mark.

CBS analyses annual and other budgets and business plans, strategic development plans and monthly performance audits to achieve its mission of planning and providing for the community. Mark feels comfortable that Greentree will help strengthen its reporting processes and future plans. "Now we have to just consolidate the experience of moving to Greentree. We aim to continue to improve our management reporting and concentrate on the analysis process of balance sheets, margins and costs. So far Greentree is proving stable, improving our processes, and we are getting better integrity of data."



Community Based Support South provides in-home and community based personal support and respite care for frail older people, people with a disability and their carers in Southern Tasmania. CBS has a Board of Management of nine drawn mainly from its consumer base. The organisation employs over 200 people.

www.cbssouth.com.au

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