



## Well-Respected Nonprofit Reduces Time Wasted on Manual Spreadsheet Updates

CASE STUDY



*"I would highly recommend Armanino's Strategy Consulting Team! They performed a technology assessment of our Finance systems which was well organized and thorough. Their team quickly followed up with a list of recommendations which were then grouped for implementation. The team was professional and a pleasure to work with."*

**-Ashley Grimm**

## Challenge

The Marin Humane Society is one of the county's oldest nonprofits, but it operates with the energy of the lively puppies and kittens it protects. The nonprofit had recently upgraded its ERP (enterprise resource planning) system, but was looking to eliminate paper and reduce the number of Excel spreadsheets it maintained manually.

Strategically, the animal welfare organization sought to determine the best use of their existing systems in the short term; whether their finance systems were a good fit for the long-term based on their entire technology ecosystem; and what types of integrations could be used in the future for a more efficient finance process.

## Strategic Execution

Armanino's Strategy and Transformation consultants conducted a technology assessment over the course of 4 weeks and performed the following activities:

- Reviewed pre-work documents
- Conducted onsite interview with stakeholders
- Engaged Armanino nonprofit and systems experts to craft recommendations
- Provided iterative drafts of recommendations to key stakeholders
- Prioritized recommendations with an actionable plan and pricing estimates

## Future State

Based on this hands-on research, Armanino made a series of recommendations to the Marin Humane Society to better leverage existing system capabilities to fill gaps and meet their goals. We endorsed specific modules for purchase within the existing software systems to improve processes and reduce the use of paper; provided a list of redundant systems to retire; and identified training resources. Finally, Armanino recommended policy and procedure changes to supplement improvements to the use of technology for an end-to-end process and technology assessment. All this was completed in just four weeks and the Marin Humane Society is moving forward on its own, benefiting from the efficiencies gained from this engagement

## About Armanino

Armanino provides an integrated set of accounting services—audit, tax, consulting and technology solutions—to a wide range of organizations operating both in the US and globally. You can count on Armanino to think strategically, to provide the sound insights that lead to positive action. We address not just your compliance issues, but your underlying business challenges, as well—assessing opportunities, weighing risks,

and exploring the practical implications of both your short- and long-term decisions. When you work with us, we give you options that are fully aligned with your business strategy. If you need to do more with less, we will implement the technology to automate your business processes. If it's financial, we can show you proven benchmarks and best practices that can add value company-wide. If the issue is operational, we'll consult with your people about workflow efficiencies. If it's compliance, we'll ensure you meet the requirements and proactively plan to take full advantage of the changes at hand. At every stage in your company's lifecycle, we'll help you find the right balance of people, processes, and technology.

## CONTACT

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