

The Leukemia & Lymphoma Society

Non-Profit Organization

Customer Success Story

For The Leukemia & Lymphoma Society, Insight Software Suite for JD Edwards increases the efficiency and financial transparency critical to a non-profit organization

About The Leukemia & Lymphoma Society (LLS):

- Non-profit founded in 1949 with national headquarters in White Plains, New York
- Mission is to cure leukemia, lymphoma, Hodgkin's disease, and myeloma and improve the quality of life of patients and their families
- Approximately 20,000 volunteers and a network of 68 local chapters across the U.S. and Canada
- LLS has invested more than \$600 million in blood cancer research
- www.LLS.org

“ We're always looking at how we can be even smarter in optimizing our financials for managing the organization overall, and Insight is a good example. With Insight, we can pull out current JD Edwards data, analyze it, and react to that data much more quickly than ever before.

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JR Miller

Vice President of Finance **The Leukemia & Lymphoma Society**

Business Challenge: Easy, timely access to data across the entire organization

The Leukemia & Lymphoma Society (LLS) is the world's largest voluntary health organization dedicated to funding blood cancer research and providing education and patient services. LLS fundraising results in millions of dollars invested in research each year.

During the early years of the organization each of the local LLS chapters handled its own accounting. In 1999, LLS decided to centralize the accounting process using JD Edwards. Only the headquarters team had access to JD Edwards and that team supplied information to all the chapters on a weekly and monthly basis by emailing large PDFs.

“One problem was that the original configuration of the JD Edwards chart of accounts may have not been optimal at LLS,” says Jeff Como, Chief Information Officer, LLS. “As a result, the information was in JD Edwards, but pulling out these ‘gold nuggets’ required a technical resource. You could add up expenses or look into revenues or P&L, for example, but sorting or filtering the data differently required a request to IT,” Como said.



ORACLE Gold Partner

InsightSoftware.com is a Gold Partner in the JD Edwards Enterprise One, JD Edwards World and Oracle E-Business Suite applications-product focus areas.

Benefits:

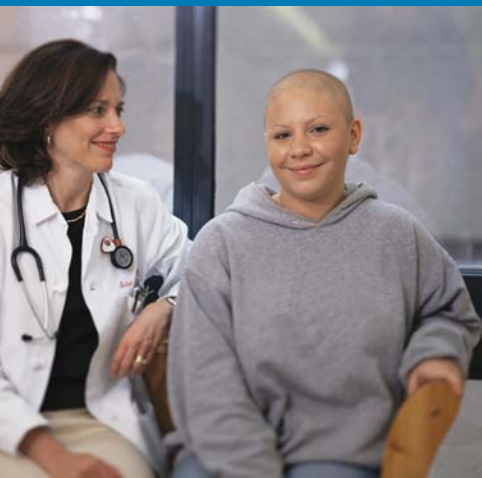
- Speeds and simplifies forecasting and budgeting for headquarters and chapter staff
- Streamlines tax preparation and compliance reporting
- Provides real-time data for mission-critical decision making
- “Tremendous” ROI is predicted when Insight® is in use across the chapters
- Frees key staff members for more strategic efforts by reducing administrative and support tasks
- Helps assure data transparency vital to a fund-raising organization

Solution:

JD Edwards EnterpriseOne™

Insight Software Suite for JDE

- Insight Reporting™
- Insight Console™
- Insight Budgeting™



LLS began to look for a solution to help chapter staff access current accounting information. “We especially wanted to eliminate the time spent keying and rekeying data in Excel, and chapters needed timely information to help make accurate predictions on their P&L,” Como says.

Solution: Insight Software Suite for JD Edwards

Steve Christos, Director of Financial Systems, LLS, was familiar with Insight and knew that it could help solve the organization’s reporting and analysis challenges. Meanwhile, Jeff Como also discovered Insight.

“I was looking for a product solution that could help us expose JD Edwards data more easily on the desktop, and I came across Insight in my research,” Como notes. “I considered business intelligence suites with plug-ins to JD Edwards, but while they provide some metadata, Insight offers the added advantage of providing a lot of templates to build on,” Como explains. “Insight was also very cost-effective to acquire and implement compared to these types of alternatives,” he adds.

“When I checked with past colleagues who had done ERP implementations, one of them said, ‘with Insight, you no longer have to figure out the Rosetta Stone of JD Edwards,’” Como says.

Today LLS is utilizing Insight Reporting™, Insight Console™ and Insight Budgeting™ to streamline their business processes. “When the senior leaders of the LLS accounting staff saw a pilot of the Insight Solution, they were pretty awe-struck,” Como states. “Dynamic filtering, dynamic reporting, roll-ups and fast access to real-time information - these are some of Insight’s capabilities that were obviously valuable,” he notes.

Streamlining Tax Preparation and Compliance Reporting

As a non-profit organization, LLS submits IRS Form 990, and the headquarters team uses Insight to help prepare the supporting work papers for that submission, according to JR Miller, Vice President of Finance, LLS.

“Insight definitely speeds the process of preparing financial statements and tax returns, allowing us to get to the information faster and do some key analyses,” Miller says. “In addition, Insight helps us organize the data to easily fit the specific format of our compliance reporting,” he adds.

“*Integrity is essential to LLS as a fundraising organization. By helping us access data easily and in a timely way, Insight provides some of the financial transparency that is vital to our operations.*”

Steve Christos

Director of Financial Systems **The Leukemia & Lymphoma Society**

Real-Time Data, Something Especially Valuable in Economic Downturn

“With economic uncertainty, we need to scrutinize our results and financial data even more closely,” Miller says. “The real-time aspect of Insight means we can access current data, not just year-to-date or month-end as in the past. Insight helps us pull data rapidly, do analysis to sort on variances, and be able to act quickly to make adjustments as needed such as controlling expenditures,” he notes.

“I see even more advantages to Insight that we’ll use in the future to manage our business even smarter, including the ‘stoplighting feature’ to highlight specific chapters or accounts where costs or variances are too high,” Miller says.

Budgeting Ease and Efficiency Vital to a Non-Profit Organization

LLS completed all of its fiscal year 2009 call-center budgets for the national office using Insight Budgeting™. Como states that he uses Insight regularly to track technology spending and IT technology cost of ownership to help his department stay within budgets.

Fundraising is a critical aspect of the LLS mission and requirements for chapter-level budgeting and forecasting were a major reason for choosing Insight, according to Christos. “Our national office budgeting is basically line-item, but the LLS chapter-level budgeting is far more complex and formula-driven,” Christos says. “Insight [Budgeting] will help us really streamline the budgeting process for both the national and chapter offices, and we are now introducing chapter staff to Insight in a phased rollout.”

Currently the headquarters team emails each chapter an approximately twenty-worksheet budgeting workbook in Excel: a time-consuming process that can result in errors. “Insight will assure accuracy and stop the headaches of emailing huge files back and forth in a process that can now take hundreds of iterations,” Christos explains.

In addition to dramatic efficiency for the headquarters staff, the budgeting process will be much easier at the chapter level using Insight. “As a non-profit, we have a slightly higher turnover rate in our chapters than in most business field offices, and training and re-training are not always cost effective. The ease of use of Insight will enable chapter staff to be involved with budgeting and forecasting without extensive training,” Christos says.

For instance, Insight Budgeting™ will help chapter staff budget based on accurate historical information, without having to research old reports. “Instead of sending out unpopulated workbooks, we can line up rows in Insight to show revenue from fundraising events in past years,” Christos says.

Insight Budgeting™ will also enable chapter staff to easily create multiple versions as they work on finalizing their budgets. For example, changing an onscreen figure for a campaign immediately reveals the impact on the overall budget number in Insight.

“Tremendous” ROI and Time Savings Predicted

“Insight will have an especially big impact on the efficiency of forecasting and budgeting at the chapter level across LLS, and I think the ROI will be tremendous,” Como states. In addition to Insight Budgeting™, Insight Console™ will also play a key role in streamlining LLS accounting processes.

“[Insight] Console™ is as straightforward as you can get,” Christos says. “We plan to bring it online for chapters to get accurate, timely information on a ‘self service’ basis. Eventually we will eliminate Excel spreadsheets and provide budgeting templates to the chapters via the Console,” Christos explains.



InsightSoftware.com's Solution

Insight Software Suite for JD Edwards empowers users to create simple, real-time inquiries to answer business questions. This improves productivity for reporting, analysis and reconciliations.

Companies using Insight gain quick access to information to increase efficiencies, enhance revenues, reduce costs and optimize cash flows.

The Bottom Line:

For The Leukemia & Lymphoma Society (LLS), Insight speeds and simplifies tax preparation and compliance reporting; providing the real-time data that is especially important in times of economic uncertainty.

Streamlining headquarters and chapter-level budgeting and forecasting were a major reason for choosing Insight. LLS predicts tremendous ROI and wide-ranging time and cost savings. Insight also helps assure the data transparency critical to a non-profit's organizational integrity.

For national staff now using Insight Console™, Christos created SmartViews™ they can explore in real-time. "Using Selectors in Insight [Reporting], I made it easy for them to drill down quickly - without my help on specific chapters' periods, fiscal years or campaigns," Christos says.

"Some of our regional controllers - the dedicated accounting people assigned to specific chapters - are using Insight on a pilot basis and they love it," Christos states. "Running a consolidated P&L in JD Edwards can take an hour and a half, but in Insight you can do a roll-up in ten seconds, allowing you to be much more responsive."

"We use Insight [Reporting] extensively for running reports for the chapters and helping them resolve questions about expenses," Christos says. "Recently, I was on the phone with a chapter and I was using the drill-down feature. I had nearly instantaneous answers and they were amazed, asking 'how on earth are you doing this so fast?' With the reporting we are piloting with the chapters now, including monthly payment and check register reports. They will be much more independent," he adds.

Holly Colbert, Assistant Vice President of Finance and Assistant Controller, describes that before LLS had Insight Software Suite, her team keyed JD Edwards data into Excel budget files for the department heads to review. "Probably two people spent about two days a month updating these files, and now they can use that time for more valuable projects," Colbert stated.

"Every time I go into Insight, I realize another use for it that will save more time," Christos states. "There are certain things I simply could not do on a timely basis without Insight," Christos emphasizes.

Direct Support for the LLS Mission

"The more cost efficient we are in overhead-administrative areas, the more we have for LLS key missions including funding research, educational programs and patient services," Christos says. "Insight makes a direct contribution to this increased efficiency," he states.

By streamlining accounting inquiries and reporting, Insight Reporting™ frees up staff time for more strategic work. Christos reports that reduced reliance on his support will enable him to devote 15 or even 20 percent more of his time to more strategic efforts.

Colbert notes that data analyses could take hours in the past and data keyed manually into Excel files was not always reliable. "With Insight, the data comes directly from JD Edwards, so we know that it's accurate, and the efficiency means we can get more done with the same number of people," Colbert states.

Insight Software Suite directly supports data transparency and organizational integrity. "With Insight, key staff members can see easily, in a timely way, exactly where funds are going. It provides some of the data transparency that is crucial to our integrity as an organization," Christos says.

Personal Attention and Easy Upgrades:

Christos states that when he calls InsightSoftware.com with a question, he knows that he will receive an answer in a timely way. "I know that I can rely on InsightSoftware.com. They keep me posted and they obviously care about our organization's support needs. It's that personal attention from InsightSoftware.com that impresses me the most," Christos emphasizes.

"Recently we upgraded Insight, and one of my colleagues said it's one of the easiest upgrades you can do. If you want support, someone from InsightSoftware.com will get on the phone and walk you through a very quick, smooth process," Christos stated.

For more information please visit www.insightsoftware.com

NORTH AMERICA: +1 855-INSIGHT

EUROPE: +44 (0)845-INSIGHT

Offices in: Costa Mesa | Denver | Houston | London | New York | Raleigh | San Francisco | Sydney | Toronto | Vancouver |