

ADSS Global Delivers a Healthy Solution for Health Advocate Inc.

CUSTOMER

Health Advocate, Inc.

INDUSTRY

Healthcare

LOCATION

Plymouth Meeting, Pennsylvania

SYSTEM

Sage Accpac ERP

Health Advocate, Inc. is the nation's leading healthcare advocacy and assistance company, serving millions of Americans nationwide through more than 5,000 individual and corporate relationships. Founded in 2001, Health Advocate helps its members navigate the healthcare system through a full spectrum of time and money-saving solutions.



The company continues to grow and expand as employers and individuals recognize the value and efficiency of its offerings. Recently, Health Advocate was recognized as one of the best places to work in Philadelphia. To ensure its financial and accounting operations are in excellent health, the company relies on ADSS Global and Sage Accpac ERP.

Diagnosing A Problem

Until four years ago, Tom Masci, CFO and co-founder of Health Advocate, and his partner handled all the accounting tasks, using QuickBooks and a collection of spreadsheets. "It worked for us at first, but as we grew it consumed all of our time," Masci recalls. "As a result, we spent more time working in our business than we did working on our business."

Masci and his team began searching for an ERP solution that would provide an efficient financial, accounting, and operations platform that would allow the company to focus on its core mission.

Prescription For A Solid ERP Solution

A business associate whose organization uses Sage Accpac ERP recommended that Masci consider switching to Sage Accpac ERP. "We saw it in action and could tell immediately that it would be a good solution for our growing business," Masci says. "Sage Accpac is a solid ERP solution that requires a relatively modest investment."

ADSS Global, a national Sage Authorized Partner, came highly recommended.

CHALLENGE

As a start-up company, Health Advocate used QuickBooks, but quickly outgrew the software. Much of the deferred revenue accounting calculations were handled outside the system using spreadsheets.

SOLUTION

ADSS Global implemented Sage Accpac ERP, customizing the software to meet Health Advocate's unique requirements.

RESULTS

Deferred revenue is accounted for within the software, saving time and effort. Streamlined billing and reporting tasks allowed for executive time to plan strategic initiatives.

"ADSS Global is a great resource for us. They bring a combination of accounting knowledge, software expertise, and IT proficiency that has proven to be a real asset."

ADSS GLOBAL

ADSS Global is a leading global partner for Sage Software with over 70 certified professionals in locations in the East Coast, West Coast, Gulf Coast, Caribbean, Canada, and in the Czech Republic.

ADSS Global provides service to over 1,200 companies in more than 20 different countries. Our mission is to provide clients with advanced financial software, eBusiness solutions, Customer Relationship Management (CRM) and network infrastructure.

Our combined experience, proven methodologies and shared national resources ensure customer success on every level. Implementing enterprise solutions and providing support through a local presence, ADSS Global is responsive and accessible to the varied and sophisticated needs of our customers.

"ADSS Global has the right combination of talent and capabilities to support our organization," says Andy Weinstein, vice president and controller for Health Advocate.

"We are very pleased with the way ADSS Global handled our implementation. They visited our site as needed, but much of the work was accomplished through remote access. In ADSS Global, we found the right partner to handle this task efficiently and to complete the job as promised," Masci adds. "They always had an eye out for our bottom line and in the end our implementation was very cost effective. We had proposals from other ERP vendors that were three to five times more expensive."

A Tailored Solution

Health Advocate has unique billing requirements that most out-of-the-box software just can't accommodate. "We bill in advance for our services, so we need to properly account for deferred revenue," explains Weinstein. "Many of the ADSS Global consultants are CPAs, so they quickly were able to grasp our situation and design an appropriate solution. Then the development team at ADSS Global was able to modify the software to handle our unique deferred revenue billing requirements."

The company generates more than 1,000 invoices each month, the majority are sent by e-mail to customers directly from Sage Accpac ERP.

ADSS was able to migrate Health Advocate's data from QuickBooks to Sage Accpac ERP, saving hours of data entry and allowing the staff to be productive right from the start.

ADSS Global also was able to modify the Sage Accpac ERP to accommodate the company's commission structure. "We pay commissions to both our internal sales staff and external brokers. There are even instances where a commission is split between agents," says Masci. "ADSS Global did a great job of customizing the software to meet our specific needs."

Streamline Reporting Tasks

Previous to implementing Sage Accpac ERP, Masci and Weinstein have developed an elaborate system in Excel to accommodate the company's complex financial statements. In the past, summarized data from QuickBooks was manually entered into Excel each month, and deferred revenue was calculated manually, line by line. It was a tedious, time-consuming process. Now, relevant data is exported from Sage Accpac ERP and imported into Excel. This saves time, increases accuracy, and facilitates a streamlined reporting cycle.

Time To Invest In The Business

"Thanks to Sage Accpac ERP and ADSS Global, we have freed up an enormous amount of executive time. Rather than spending our time on routine accounting tasks, we can focus on strategic initiatives," says Masci. "We produce ten times as many invoices now as we did a few years ago. Without Sage Accpac ERP, we wouldn't have the opportunity to direct our growth, and instead we would have spent all our time playing catch up."

Weinstein concludes, "ADSS Global is a great resource for us. They bring a combination of accounting knowledge, software expertise, and IT proficiency that has proven to be a real asset."



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