

# CASE STUDY

## Dean Dorton gives Legacy Healthcare better reporting and greater efficiency in the cloud



Legacy Healthcare Services provides seniors with a variety of services in 12 states and the District of Columbia. Multiple locations and multiple services provide a unique reporting challenge for the Legacy accounting department. In fact, the accounting team needs to produce nearly 300 different reports each month.

Legacy worked with Dean Dorton to replace their on-premise accounting solution with a cloud-based solution that provided greater flexibility for reporting, integration with other mission-critical software solutions, and operates in their paperless office environment.

### The Challenge

#### Rigidity of On-Premise ERP Software and Inadequate Reporting

Legacy Healthcare Services was feeling the constraints of Microsoft Dynamics GP. The on-premise solution had long ago fallen behind the needs of the fast-growing healthcare organization. In fact, Legacy fell seven years behind on software updates because they were overwhelmingly time consuming for the department.

Legacy's CFO Jeff Huffman knew it was time to make a change. He wanted to replace his system with a solution that would give their management team access to more analytical views of the business.

Legacy Healthcare produces nearly 300 different financial statements monthly, and Microsoft Dynamics GP did not offer the ability to create a general ledger that was efficient for Legacy. "To structure all 300 different versions, we needed to have a system with a back bone that could handle it," said Jay Huffman, Legacy Healthcare CFO.

### The Solution

"Upon taking my position at Legacy, I had a lunch with Philip Massey and Jim Stubanas" said Huffman. "I felt completely at ease with the consulting firm choice afterwards and looked to them for advice on moving to a new ERP system."

Dean Dorton demonstrated the abilities of Sage Intacct with emphasis on the dimensional reporting capabilities that would simplify and automate the tremendous reporting requirements of Legacy.

Moving to Sage Intacct would eliminate the tedious and disruptive need to install multiple upgrades for the legacy solution. Going forward, Legacy wouldn't have to worry about software updates due to cloud delivery of their application as all upgrades happen behind the scenes and far more frequently than every 12 to 18 months.

Another benefit of moving to cloud-based Sage Intacct is the more open architecture of Intacct that facilitates easier integration



*After installing Sage Intacct, Legacy has a completely different accounting department. We close faster than we ever have.*

*Jay Huffman, CFO at Legacy Healthcare*



with other software solutions. This became an important factor for Legacy when they began to integrate ISV solutions. For example, Sage Intacct's seamless integration with Nexonia has made travel expenses an easy process for Legacy employees.

The collaboration of Sage Intacct with MineralTree was also a selling point. With Sage Intacct's best in class philosophy, Legacy has been able to select the their choice of ISVs for their company to create a total solution that works best for their accounting team.

Legacy Healthcare has seen a 50% reduction in their closing time. The time-savings mean they can complete additional projects that previously were on hold or impossible to fulfill because of the constraints of their legacy ERP software.

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## Results with Sage Intacct

### A More Powerful Solution and a More Proficient Team

Now that Legacy has implemented Intacct, they have more flexible reporting that accommodates their specific business needs. And, with updates that happen four times a year, Legacy can maximize their use of Intacct and the evolution of the ERP system without the hassle of manual updates. Legacy's need of a paperless system was also met with Sage Intacct.

"Sage Intacct, overall, is a more simplified system," said Huffman. "Sage Intacct gives you greater reporting capabilities. There is a better general use of our ERP system since moving to Sage Intacct."

*The reporting capabilities and general efficiencies have won everyone over. There were some skeptics; however, they have all converted.*

Jay Huffman, CFO at Legacy Healthcare

## Why Dean Dorton?

Dean Dorton continues to be a knowledgeable source for Legacy Healthcare, committed to educating Legacy Healthcare on all updates and evolutions of the product as well as ISVs that would improve their business efficiency.

Dean Dorton offers free, monthly training sessions—termed "Cloud Bytes"—that Legacy can take advantage of to stay on top of Sage Intacct functionality as well as has regular meetings with Legacy personnel to ensure proper system performance.

*Dean Dorton did a great job understanding and relating to our business needs.*

Jay Huffman, CFO at Legacy Healthcare

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