

## Measurable Results – Wisconsin Credit Union League

Hi, my name is Beth Ellis. I'm the Senior VP of Finance and Strategic Partnerships with the Wisconsin Credit Union League. The Wisconsin Credit Union League is the trade association for Wisconsin credit unions. We provide advocacy for our credit unions on their behalf, as well as education, legal, and counseling services.

In 2019, we needed to make a switch from our accounting platform as the previous application we were using was being sunset, and we wanted to take advantage of working in the cloud, with our team spread out throughout the state. We also wanted some automation processes that would help us be more efficient in what we were doing and Acumatica met that need.

SVA had a really strong implementation team, all the way from the very beginning, when we were going through the sales process and trying to choose which product to implement, and then in the implementation. We actually went through implementation planning to do it pre-COVID, and the day after we met to kick off the event, COVID hit and everything shut down, so we had to shift and move everything virtually, and it was seamless working with the team virtually. They had a really strong working knowledge of Acumatica, that any questions we had about the system they were able to answer and the consulting team was also really great to help us understand business improvements we could put in place because they understood where we were coming from and they knew what Acumatica was capable of, so they could match those up and give us some ideas to improve our processes and be more efficient as we went forward.

After we went live with Acumatica, we immediately saw a time savings and just simple things, like our check runs, that those were much more efficient in our processing because they were online, we didn't have paper, and so those went from being in some cases a couple hour process to really a matter of minutes. Even after the implementation, we've seen a lot of improvements. We have a much better process for our approvals that our senior management team doing those approvals appreciates that they're not doing them manually and that we also aren't having to follow up with those people. We can have them just in the system get notifications. They log into Acumatica and quickly approve any invoices pending their approval. In addition, when working with our external auditors, they've really liked the application, both from a control standpoint that there are better controls that they can see and view that we have the proper controls in place, We also have had time savings in our audit because we have the information easily accessible, whether it's viewing invoices, transactions, or approvals, that we can provide to our auditors very easily and quickly.

I would recommend that people work with SVA because they really work to understand both your business needs and your business process, to make sure that what they're putting in place is going to work well for you rather than for just anyone.