



A first for First Nonprofit

Based in Chicago, First Nonprofit has been dedicated to serving nonprofit organisations through innovative insurance and financial services for more than 25 years. First Nonprofit entered into the unemployment insurance field in 1995 to develop a product to help their nonprofit policyholders reduce the rising costs of unemployment insurance.

First Nonprofit had been using the Windows-based Freedom for cash basis General Ledger and Accounts Payable and a manual system for customer relationship management, but recognised a need for an integrated system and one place to share and store customer information. Additionally they needed to improve their underwriting process and make it consistent and scalable. With

the volume of work growing at more than 20 percent per year it became clear to First Nonprofit that their incumbent system was not set up for the growth of the company.

First Nonprofit undertook an extensive and detailed search for a new system and after two years carefully evaluating their options found Greentree and ERP Visions. From that point First Nonprofit spent another two months analysing Greentree's functionality against MS Business Solution's Solomon and Great Plains. "Greentree was right for our business. We were particularly impressed with the Financial Reporting Engine in Excel, CRM quote integration with Excel and Transaction Analysis Codes," offers Cecilia Piazza, Program Director of First Nonprofit.



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“We know that Greentree will be able to support First Nonprofit’s new business initiatives and ERP Visions will be an on-going asset for First Nonprofit as they continue to be responsive to our needs.”

- Cecilia Piazza, Program Director, First Nonprofit



Greentree Business Partner, ERP Visions kept the implementation project on track and allowed First Nonprofit to complete their annual renewal process for their Unemployment Savings company. “ERP anticipated the impact of the changes in business processes on First Nonprofit and worked to fully understand our business model and requirements.” Financials and CRM were deployed simultaneously and second company phased in shortly after. “ERP offered and delivered, on a fixed bid implementation. This certainly was a key factor in selecting our new business solution.”

“Greentree has been well received by the staff. It is an intuitive and easy-to-use system. The on-line help and ability to annotate field-level help were new things available to our users. The workflow desks and favorites enabled us to configure workflow panels geared to each user’s responsibilities.”

First Nonprofit is already noticing measurable improvements in their processes with Greentree growing their membership and customer base without increasing staff numbers representing a real cost saving to the business. “Greentree has reduced work effort for renewals from six work weeks to four work days. Annual statements used to take one to one and half weeks now take one to two days and there has been a real improvement in response time to customer inquiries,” reports Cecilia. “In particular Greentree’s Financial Reporting Engine in Excel’s drill down feature provides us real-time access to activity by Transaction Analysis Code for customer and member queries.”

The implementation of the CRM suite into the business is also proving a success. Cecilia comments, “Greentree’s ability to consolidate all records concerning the customer’s activity into one database, gives us quick easy access and confidence to respond to all types of inquiries.”

First Nonprofit is geared for rapid growth and confident about a future with Greentree and ERP Visions. “We know that Greentree will be able to support First Nonprofit’s new business initiatives and ERP Visions will be an on-going asset for First Nonprofit as they continue to be responsive to our needs.”

ABOUT FIRST NONPROFIT COMPANIES

First Nonprofit is dedicated to serving nonprofit organisations through innovative insurance and financial services. First Nonprofit entered into the unemployment insurance filed in 1995 to develop a product to help their nonprofit policyholders reduce the rising costs of unemployment insurance. Today First Nonprofit serve more than 700 organisations across the country covering more than 100000 employees.

For more information visit: www.firstnonprofitcompanies.com

ABOUT GREENTREE

Greentree International specialises in developing highly effective business management software solutions. The Greentree product has been developed by the authors of CBA, arguably the most successful business software package for small to medium sized businesses in Australia and New Zealand.

In choosing Greentree you are selecting a business system that will truly empower your organisation today and grow with you into the future. The Greentree Partner Network provides a highly skilled local support team that will ensure you achieve tangible business benefits. Greentree has also recently been recognised as a global ‘Rising Star’ by MIS magazine Australia.

For more information visit: www.greentree.com

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