

CASE STUDY

CLIENT:	AGPAL
INDUSTRY:	Not for Profit
LOCATION:	Australia
PRODUCT SUITE:	EXO Business
MYOB ENTERPRISE PARTNER:	Momentum Software Solution

EXO proves it's the right system to rely on in a merger

Overview

Established in 1997, AGPAL is a not-for-profit organisation that provides accreditation and quality improvement to general medical practices in Australia, including the Royal Flying Doctors and Aboriginal medical services.

The accreditation is based on standards developed by the Royal Australian College of General Practitioners and provides assurance for owners, managers, staff and funding bodies across the country.

As a quality improvement organisation, AGPAL has always looked for ways to improve its own internal processes. But not so long ago, back-office systems were making that difficult.

Duplication beyond belief

AGPAL had been using Account Right since the organisation started in 1997. As an accounting system it was perfectly capable, particularly for a small business, but integrating it with other systems was proving difficult.

Richard Dennis, CFO, explains: "As well as Account Right, we ran a CRM system. We needed to keep both up to date and that meant having to enter information like invoices and payment details into one system – and then repeat the process in the other.

"When I joined AGPAL, I saw duplication everywhere and thought, 'We're already using one SQL-based system [iExpress] for operations and CRM. If we bring in another for our accounts, we can integrate data from the two and cut out all this extra work.'"

So that's exactly what they did, turning to MYOB EXO for the solution.

The importance of SQL

As an SQL-based system, MYOB EXO would be able to integrate seamlessly with iExpress. It would provide AGPAL with much needed analysis and reporting too.

"We really wanted to improve our client interaction and reduce the time clients were left hanging on the phone," says Richard.

Previously, customers who wanted to review their account would have to wait to speak to someone in finance. With EXO, timely and accurate information could be fed automatically into the CRM system, allowing operational staff to answer queries easily themselves.

EXO's SQL back-end meant AGPAL would also be able to do a lot of their own report creating and customisation – which was another big plus for the system.

"With some ERP systems," says Richard, "you have to find someone else to create reports, and that can get expensive. We knew we had the skills to do it in house."

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Working with Momentum

To help implement EXO, AGPAL turned to Maroochydore-based implementation partner Momentum. According to Richard, the installation went “close to plan”.

“When you change systems it’s always challenging,” he says.

“You’ve got new processes to familiarise yourself with and new ways of doing things. The sign of success is being able to manage issues as they arise and move on.”

According to the AGPAL boss, what Alistair Emery [Momentum’s MD] doesn’t know about EXO you can fit on a postage stamp. But right across Momentum, there’s a good mix of staff with capabilities and communication styles that make them adaptable to any organisation.

“With their help we managed to get things sorted quickly,” says Richard.

EXO’s ability to accommodate growth

Now that EXO’s been installed a while, Richard freely admits the system is doing exactly what he wanted it to – and has the potential to do a lot more.

“When we bought EXO, we knew we were looking at a possible merger. Well, that merger has just happened and we’ve doubled in size. We’ve doubled our people and we’ve doubled our turnover.

“Some systems would struggle with that, but EXO easily has the capacity.

“Admittedly our needs are relatively simple, but knowing that we can use this system in Melbourne and Sydney and have staff in those locations supporting the business locally as well as nationally is a real bonus.”

Seamless reporting

Using iExpress and EXO as one, AGPAL are getting the seamless reporting Richard was always looking for.

“At a basic level we are looking at very timely profit and loss accounts by state and by product. We can pass that information straight to the general managers of our various sites, which gives them much greater control of their budgets.”

Asked whether he could put a dollar value on the improvements he’s seen since implementing EXO, Richard says there are some obvious wins.

“We aren’t duplicating effort any more so that’s an immediate saving right there. Raising invoices is now just a small part of one person’s job too. Previously, it used to take a lot of time.

“Really though,” remarks Richard, “EXO’s true selling point is its ability to enable you to get more out of the same resources.

“We’re now much more focused on our clients, even though we’re the same number of people,” he says.

A bucket load of value

“The good thing with EXO is that I know it is only going to get better.

“The flexibility it gives us means we’re now able to do things in house quickly – like building the chart of accounts for two new companies (Quality Innovation Performance and Quality Innovation Performance Consulting Pty Ltd) and setting up the P&L using clarity reports. SQL reports will follow soon.”

As a quality improvement company, AGPAL are focused on improving their own internal quality, as well their clients’.

“EXO’s allowed us to do that,” says Richard, “and given us a bucket load of value in the process”.



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