

MYOB Advanced

Client Medical Protection Society | Partner Momentum
Location Australia | Product MYOB Advanced | Industry Training
& Support Services; Not For Profit



Professional services supported

The Medical Protection Society Limited (MPS) is the world's leading protection organisation for doctors, dentists and healthcare professionals. As a long-time MYOB user, when the time came to update its financial management systems, it chose MYOB Advanced, implemented by Momentum.

Problem

Integrated CRM, Finance required

MPS protects and supports the professional interests from across Australia, New Zealand and Southeast Asia. It provides its members with a range of educational and risk management services to contribute to risk reduction. The courses run by its Australian branch's education arm, Cognitive Institute, are attended by thousands of clinicians every year from across Australia and Southeast Asia.

"While we'd been using MYOB Premier for a long time, its limitations were showing," says Service Delivery Manager, Lynley Mangin. We had recently installed Salesforce CRM and upgrading our finance system to one that would integrate with Salesforce was a major step to enable significant growth with existing resources."

Extracting data for various reports was a time-consuming task, and a more flexible reporting tool was required.

"We wanted to be able to dig down to obtain a more diverse range of data," Lynley explains.

MPS also wanted a Cloud-based system that could link with the cloud system run by its UK parent, and to support an increasingly mobile workforce.

"The solution needed to be able to cope with our multi-currency environment and also to provide and receive data feeds between finance and Salesforce," says Lynley. It needed to be an enterprise system to accommodate future growth, and ongoing plans to further streamline processes and automate as much as we possibly can."

Other systems assessed were either too big or too small, and the organisation's history with MYOB meant that Advanced was on the radar from the outset.

"Advanced's flexibility meant it could be structured to meet our requirements, rather than having to change our requirements to meet the system," Lynley says.

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Solution

A complex job well done

Advanced's ease of integration with other systems has delivered major dividends for MPS. Momentum's consultants showed their experience in tackling what turned out to be a complex implementation.

"Momentum made a real effort to understand our business; what we want to achieve and why we want to achieve it," Lynley says. "The installation process was complex, but we never got the sense from Momentum that anything was unachievable – they would generally get to the source of a request and propose a workable solution. They're good people to work with."

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Outcome

Better reporting and visibility

With Advanced, MPS is now achieving the reporting standards it required. Data is extracted more quickly and easily, and the integration with Salesforce gives greater visibility of the revenue generated and costs incurred from the various events it stages.

Double-keying of data was another concern; events staff would key information into Salesforce and then the finance staff would have to re-key the information into the legacy Premier system. Single-point data entry is now a reality and a potential for errors has been eliminated.

“MYOB Advanced is making a significant difference to our business, and we know that adaptations are possible to improve our operating processes as we move forward and provide even better service to our members,” Lynley concludes.

“Advanced is making a significant difference to our business.”

Before	After
+ Lack of detailed reporting	+ More comprehensive reports
+ Reports slow and difficult to extract	+ Data readily available
+ CRM integration required	+ CRM integration achieved
+ Too much double data entry	+ Double entry reduced