

CASE STUDY

A Digital Transformation Journey - From Legacy Constraints to Financial Empowerment

Centacare NENW and PBT revolutionise finance with Sage Intacct, enhancing visibility, streamlining purchasing, and empowering data-driven decisions for greater community impact.



The Organisation

Centacare New England North West delivers vital social and community services across regional New South Wales. Their mission focuses on strengthening families and supporting vulnerable communities through programs in mental health support, disability services, family intervention, and employment assistance.

The Challenge

As Centacare NENW expanded its community impact, the organisation found itself increasingly limited by outdated financial infrastructure that couldn't keep pace with its evolving needs.

"We needed a financial system that could match our service delivery model, diverse, community focused, and always evolving. Our old systems were holding us back from gaining timely insights and responding efficiently to change."

Meg McKechnie, CFO, Centacare NENW

The organisation was struggling with fragmented data silos across disconnected systems, slow, manual reporting processes, inefficient workflows requiring duplicate data entry, and limited visibility across programs and funding sources.



The Transformation Journey


After careful evaluation, Centacare NENW partnered with Progressive Business Technologies (PBT) to implement Sage Intacct as their financial management platform.

Why Sage Intacct?

Sage Intacct offered the perfect combination for Centacare's needs. Its cloud-native architecture provided anywhere, anytime access to financial data. The sophisticated reporting capabilities enabled multi-dimensional analysis essential for program management and extensive integration potential allowed seamless connection with existing systems. Finally, its nonprofit-specific functionality addressed the unique requirements of mission-driven organisations like Centacare.

Why PBT?

PBT's specialised ERP implementation expertise combined with their deep experience with NDIS and nonprofit organisations uniquely positioned PBT to understand Centacare's operational context. A proven delivery methodology ensured project discipline and predictable outcomes, and their commitment to stakeholder engagement fostered ownership across the organisation.

 *"The PBT team helped us think beyond just technology; they guided us through a full business process transformation with brilliant project control and implementation stages. Their structure, communication, and commitment made the difference."*

 Meg McKechnie, CFO, Centacare NENW

Transformational Outcomes

Financial Visibility Revolution

Sage Intacct's dimension-based reporting transformed how Centacare understands its financial landscape.

The finance team gained unprecedented ability to track income and expenditure by funding source, compare program performance across multiple locations, and generate compliance-ready reports on demand.

The Integration Breakthrough

A cornerstone achievement was the seamless integration between Sage Intacct and Penelope, Centacare's case management and client billing platform.



This integration:

- Eliminated duplicate data entry
- Automated billing and service data transfer
- Improved invoice accuracy and accelerated billing cycles
- Created a unified view of financial and service delivery data

Financial Control Transformation

Intelligent Spend Management

The implementation of Sage Intacct's Spend Management module revolutionized expenditure control:

- Real-time budget validation at the point of purchase
- Empowered program managers with financial visibility
- Streamlined approval workflows while maintaining compliance
- Reduced the risk of unauthorized spending

Purchasing Workflows and Approvals

Centacare NENW leveraged Sage Intacct's powerful purchasing workflow tools to streamline its purchasing operations. The new system introduced structured approval hierarchies, real-time visibility into purchasing activities, and tighter budget controls, significantly reducing processing times and creating visibility.

Dynamic Cost Allocation

The implementation of automated cost allocation rules eliminated spreadsheet-based calculations:

- Fair distribution of shared costs across programs
- Allocation based on relevant drivers (FTEs, revenue, etc.)
- Automatic execution at period-end
- Consistent application of allocation methodology

Operational Impact

The transformation delivered measurable improvements:

- ◇ **50%+ reduction** in manual data handling through integration
- ◇ **Real-time visibility** replaced monthly reporting cycles
- ◇ **Month-end close reduced** from weeks to days
- ◇ **Enhanced compliance** with funding requirements
- ◇ **Elimination of spreadsheet**-based processes
- ◇ **Strengthened governance** through automated controls
- ◇ **Greater autonomy** for program managers

The Human Element

While technology was central to this transformation, leadership and collaboration were equally vital to its success.

"Meg's leadership was pivotal. From day one, she championed collaboration, engaged stakeholders, and drove a culture of ownership. This wasn't just an IT upgrade, it was a strategic transformation backed by strong governance and purpose led change."

Sherry Herman, Project Leader, PBT

Looking Forward

With Sage Intacct now at the heart of its financial operations, Centacare NENW is positioned to make data-informed decisions about programs, respond agilely to changing community needs, scale operations efficiently while maintaining financial discipline, and focus more resources on mission delivery.

The combination of visionary leadership from Centacare NENW, best-in-class technology, and strategic implementation expertise has equipped Centacare to fulfill its mission with greater impact and sustainability.

Successfully Implement Sage Intacct with PBT

Seamless setup.
Expert support.
Increased Efficiency.

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