SERENIC® SOFTWARE

BUSINESS SITUATION

JMM needed to replace its disparate financial systems across five international offices to provide a more effective, consistent platform that would allow for future growth. Critical to this goal, it required a global system that could handle its foreign offices' divergent tax rules and regulations regarding credit card use.

SOLUTION

The ministry chose Serenic Navigator Advanced Management Edition – certified for Microsoft Dynamics NAV – along with Serenic DonorVision to better manage its complex donation and order fulfillment business processes.

BENEFITS

- Improved accuracy, consistency and data collection for U.S. distribution providing cost-effective solution for "real-time" updates with global view

- Ease-of-use for better internal control and capability to measure marketing efforts

- Enhanced efficiencies provide requisite cash flow for partner programs enabling greater customer satisfaction to, ultimately, support core mission initiatives trail functionality, and alpha-numeric chart of accounts.

Serenic® Navigator Helps Joyce Meyer Ministries Manage Worldwide Fundraising Channels

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— ROBERT SANABRIA, CIO, JOYCE MEYER MINISTRIES

Joyce Meyer Ministries (JMM) is an international nonprofit organization that focuses on reaching people through media. With 15 international offices, JMM has a potential global audience of 3 billion people representing two-thirds of the world. The ministry's "Enjoying Everyday Life" program currently airs on nearly 1,000 television and radio stations in 38 different languages.

Impacting lives around the world, through its outreach arm, Hand of Hope, JMM provides life-changing global humanitarian and missions relief. In 2009, the ministry provided more than 22 million meals supporting feeding centers in 25 countries and free medical care to over 170,000 people in multiple remote areas. JMM also operates 44 children's homes globally, feeds more than 55,000 children daily and provides a host of other disaster, missions and humanitarian aid.

Throughout the U.S. and abroad, JMM holds powerful, memorable conferences that give people an opportunity to come together to learn and grow. Each year, hundreds of thousands attend its U.S. conferences and more than 1 million have turned out for international events.

Global Scenario

In recent years, JMM underwent an innovative reinvention of itself by setting an aggressive growth course through new and diversified resources, presentations and services along with updating fragmented technologies and unsophisticated business processes making the bold, challenging decisions necessary to propel the ministry into the next decade. Audience expansion and "growth through innovation" have been both vision and model behind the restructuring of this former "mom-and-pop" organization into a dynamic state-of-the-art ministry model—all done with the focused goal to better serve the ministry's multiple constituent partners and audiences.

"I can, literally, log in and grab information for a report or an annual audit in a quick second versus having to dig like I used to or wait for someone in a different time zone to send it."

— MEGAN BORGHI
  STAFF ACCOUNTANT

JMM's scale is large with founder Joyce Meyer's books, teachings and other resources available worldwide, supported by multiple offices and distribution channels around the globe. Customers respond to the ministry's special offers for media, books and programs by phone, mail or through its online stores. Call centers and e-stores process orders, while a customer service department handles mail and correspondence. Order fulfillment is handled by JMM's U.S. warehouse and multiple international locations.

Two existing financial software systems—Sales Logic and Sage MAS—were no longer ideal for the organization's complex business processes requiring the use of three other disparate systems to collect customer data related to its phone, mail and online orders. Recognizing an impediment for optimum efficiency, in 2007, JMM knew it needed an integrated order management system to help eliminate the (then) 45-day lag time to access up-to-date information on sales and inventory.

"Admittedly, we were struggling with pulling numbers and data from foreign offices and responding effectively," said Robert Sanabria, JMM's chief information officer. "Needing a cost-effective, integrated solution, we wanted to use best practices for enterprise resource planning (ERP) and create a worldwide system with a common, 'vanilla' architecture at the core that could be customized for specific business processes."

JMM knew it could not meet its ambitious business objectives with existing systems that weren't able to optimize, adapt or expand with its planned growth and sought a flexible, cost-effective solution to build the customized tools needed to support its business requirements, considering solutions from PeopleSoft, SAP, Oracle and a few different suites within the Microsoft Dynamics NAV family.

After careful review, the ministry selected Serenic Navigator for its unique capabilities, ability to manage and support international requirements, and to establish a solid foundation to utilize best practices without stifling JMM's ability to grow. Implementation began in 2008, and JMM now has 200 employees worldwide using the Serenic Navigator solution suite including Serenic DonorVision.

International Implementation

For implementation, JMM worked with Serenic and its partner, Tectura, to install Serenic Navigator in five offices—starting in August 2008 with the United Kingdom, which handles 60,000 partners, and ending in June 2009 with its U.S. headquarters, which handles 1 million partners. Satellite offices in Australia, South Africa and Canada, with about 15 Serenic Navigator users each, followed.

With its own IT teams intricately involved in start-up and training, JMM began implementation with its smaller foreign offices to learn from the transition experience before tackling its largest operation in the U.S. ensuring minimal business interruptions and problem-free transition. Staff Accountant Megan Borghi coordinated foreign office implementations.

"After each office went live, we held a series of lessons-learned sessions to identify issues and make requisite changes to the implementation plan to become more efficient," Borghi said. "Thanks to a united team effort, each implementation experience improved as we moved forward to meet our collective goal of implementing an enterprise solution that would support new business initiatives and help take us to the next level."

The implementation culminated in the U.S. where JMM has 176 total users. Of those, 150 are frontline teams working in the call center, customer service and correspondence with the remainder supporting ERP and finance.

Project manager Angela Triplett, who oversaw the U.S. implementation, describes the complex large-scale project as a huge success with valuable lessons learned along the way as the smaller, foreign office changeovers were instrumental in ensuring a smooth "grand finale" execution in the U.S.

"As part of our planning strategy, we set up a command center with one person from each functional area brought together in a room to take calls for help on go-live day," Triplett said. "We went live and waited . . . and the phone didn't ring! We had lunch, continued waiting and were astonished that no one needed help. The consultants were especially in disbelief, as they'd never undertaken an implementation of this magnitude without experiencing issues or outages. It is virtually unheard of to put in an ERP system without, at least, minor glitches."

Worldwide Benefits

Overall, Serenic Navigator has met JMM's project goals to install a system that could:

- Showcase flexibility, adaptability and be upgraded with little customization
- Provide consistent data among five offices for more accurate, timely reporting
- Enable efficiencies for call center representatives to reduce time required for data entry and reporting calls

Improved Accuracy and Consistency

Previously, JMM offices were running on different financial and operational systems with teams spending a lot of time reconciling sales and order entry differences that Serenic Navigator now consolidates.

"It used to take a month and a half to get accurate information such as sales and inventory numbers to our executive team," Sanabria said. "Now it's overnight as we can seamlessly compile data into an integrated virtual warehouse with a global view."

Additionally, with previous systems, cost-effective distribution out of the U.S. was nearly impossible, because JMM logistics weren't automated.

"Serenic Navigator gives us needed consistency with all of our call centers now using the same scripts and distribution using the same pick-pack-and-ship system," Sanabria said. "From an expenditure perspective, there are hard costs associated with improved consistency. As we make changes in one office the resulting benefit impacts all five offices."

Ease-of-use and Better Internal Controls Help Measure Results

Prior to Serenic, JMM domestic accounting couldn't see live data from foreign offices. Because each location had to send reports, including monthly back-ups that had to be manually consolidated, one of the project goals was to have better live access for management.

"Serenic Navigator has helped provide new efficiencies and internal control to enable us to help foreign offices answer questions," according to Borghi, who oversees internal reporting for executive management. "It's so much easier to pull information out of the system to find what you need. Financial reporting is now easier because you can drill into a chart of accounts without having to follow transaction numbers. I can, literally, log in and grab information for a report or an annual audit in a quick second versus having to dig like I used to or wait for someone in a different time zone to send it."

Serenic Navigator's ease-of-use at the call center level helps JMM further measure its marketing programs by attributing customer orders to specific marketing offers.

"Now, we can quantify orders at a granular level giving the marketing department what they need to see for results measurement," Sanabria said. "This also provides us with the ability to tie a variety of promotions and special offers to sales, a capability we never had in the past. Navigator makes it very simple for a call center rep to have the right offer applied with just one or two clicks."

Real-time Updates Provide Enhanced Support to Partner Programs and Mission Initiatives

Across multiple operations – from faster order fulfillment to more informed decisions at the executive level – Serenic Navigator's real-time access to data enables JMM to benefit from enhanced business efficiencies.

Thousands of ministry partners make contributions and give gifts on a monthly basis. With the previous system, transactions would have to happen after hours, taking up to six days to reconcile credit cards and record transactions, ultimately, becoming a monthly sales order the warehouse would have to fulfill.

"Historically, the first of each month involved a very complex process and business interruption," according to Sanabria. "After installing Serenic Navigator, the very first monthly run in the U.S. was processed in a few hours versus what used to take four or five days. We also fulfilled a special promotion offer within two days, a process that would have taken a week or more previously."

Overall, JMM says Serenic is helping the ministry meet its operation and mission objectives.

"Around the world, our feeding centers, children's homes, medical centers and disaster aid efforts all require cash flow. When you look at what we do and how we accomplish our work, we're now capable of doing things that were impossible with our old systems as the new processes we've created provide greater efficiencies and a higher level of excellence that keeps our valued relationships with partners and donors strong."

Sanabria believes that, at all levels, systems "should just work." He is confident the organization is finally to a point where they don't have to worry about systems failing and affecting daily operations. Summarily, both he and his IT teams have concluded the end-results were what they were looking for.

"The day we went live was a huge win for the entire Joyce Meyer Ministries team," said Sanabria. "Looking back, one of the most important benefits gained from this experience was that the Serenic and Tectura teams were more than just consultants. In collaboration, their designed approach, mandate and charge were to endeavor, together, to do something special resulting in a relationship that became a real partnership."

About Serenic Software

Serenic Software develops and delivers mission-critical ERP software solutions for public service organizations including: K-12 school districts/boards, public sector, nonprofits (NPOs), and international non-governmental organizations (NGOs). Serenic is a Gold ERP and ISV vendor and a development partner for Microsoft. Serenic public service solutions are trusted by over 1,000 organizations around the globe. You can learn more about Serenic Software at www.serenic.com.

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