

Customer success story
First Nonprofit Companies

Industry \$
Finance & Insurance

Not for Profit ♥

Location
United States

Greentree product suite
Financial Management
CRM
Workflow

GREENTREE A FIRST FOR FIRST NONPROFIT

Based in Chicago, First Nonprofit has been dedicated to serving non-profit 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 its non-profit 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, it needed to improve its 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 its 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 its 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.

Greentree Business Partner, ERP Visions kept the implementation project on track and allowed First Nonprofit to complete its annual renewal process for its 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 a 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 online help and ability to annotate field-level help were new



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Cecilia Piazza, Program Director, First Nonprofit



“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

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 its processes, with Greentree growing its 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 that 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.”

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First Nonprofit Group
An AmTrust Financial Company

First Nonprofit is dedicated to serving non-profit organisations through innovative insurance and financial services. First Nonprofit entered into the unemployment insurance field in 1995 to develop a product to help its non-profit policyholders reduce the rising costs of unemployment insurance. Today First Nonprofit serves more than 700 organisations across the country, covering more than 100,000 employees.

www.firstnonprofitcompanies.com

PARTNERS IN PRIME

Our partners are rare gems with unique, unparalleled skills. Individually and collectively, they’ve earned their stripes transforming thousands of businesses with Greentree software. They have a deep understanding of business needs. The demands are complex, but our partners relish the challenge of making business better. And when you use one Greentree partner, you gain the knowledge of them all. Everyone benefits from tapping into this vast pool of intelligence.

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