Online Payment and Staff Efficiency Improvements for the Benevolent and Protective Elks of the USA

Company Facts

Overview
- **Website**
  https://www.elks.org/
- **Location**
  Chicago, Illinois
- **Industries**
  Non-Profit
- **ERP**
  Sage Intacct

Success Highlights

Challenges
- Increase in number of invoices
- Time-consuming paper check processes and excessive fees
- Finance team process inefficiencies
- Staff bogged down with manual data entry and chasing paper

Benefits
- Freed up staff time by over 25%
- Paper checks reduced by nearly 40%

The Benevolent and Protective Order of the Elks of the USA is a fraternal organization founded in 1868. Today, The Elks organization has hundreds of thousands of members, with a network of nearly 2000 lodges in communities all over the country. This Fraternal Order was founded "To promote and practice the four cardinal virtues of Charity, Justice, Brotherly Love and Fidelity; to promote the welfare and enhance the happiness of its members; to quicken the spirit of American Patriotism and cultivate good fellowship."

The Order spends more than $80,000,000 every year for benevolent, educational, and patriotic community-minded programs including: benefitting special needs children, sponsoring Elks National Foundation scholarships, scouting, athletic teams, veterans' works, a national "*Hoop Shoot*" free-throw contest involving more than 3 million children, and many more.

Key Challenges Impacting the Elks' Finance Team
Automation was a long time coming for the Benevolent and Protective Elks of the USA. As a long-standing Sage Intacct customer, emailed invoices had become commonplace for the Elks. Collections for the 150+ year old institution works differently than most organizations. Invoices for dues and lodge fees are sent out to the individual 1,800+ lodges. When invoices hit the 60-day outstanding mark, local district deputies and then state sponsors will follow up with individual lodges for remittance.

Due to the large number of traditional processes, the Elks' lone AR team member found themselves often playing catch-up to close out invoices and process hundreds (or more) paper checks each month.

In 2018, due to several new and updated bylaws, which included the collection of outstanding, pro-rated dues, the number of invoices issued by The Elks increased five-fold. Facing upwards of 1,800 invoices per month, receiving a mainly paper check-based payments, the Elks had hit critical mass. It was at this time that the journey for a better, more efficient process began.

With paper check processing becoming both a growing time and money suck, finding a platform that could connect through with Sage Intacct to process online payments was crucial. Not only would this free up the existing AR team's time, but also would free up the need to hire a second, dedicated AR person for the team. At the same time, there was a need to increase the efficiency and improve the invoice development and deployment process.

How could the Elks improve their invoice deployment, implement an online payment tool, convince the 1800+ lodges to move to an online platform, and implement as a cost savings initiative? Enter Lockstep.

"I see more and more people using Lockstep. If someone calls and says, 'I don't know how to look at an invoice,' that excites me a little bit, because I can tell them how to do it, and that's one less lodge to have to do that for in the future. And over the last three years, we've reached most of the (1,800+) lodges in the United States." -Matt Lucas

Choosing Lockstep and the Implementation Process

"*We needed to adopt a more convenient and modern payment option for our lodges*," notes Matt Lucas, assistant controller for The Elks. "*A key function missing for our lodges was the ability for them to pay online through ACH or credit cards.*" With the approval to source a solution, Lucas met Lockstep staff at conference, "*and we started to talk. We wanted to avoid huge merchant fees and wanted to make sure there was a seamless integration with (Sage) Intacct.*"

The Elks considered several automation platforms for their needs and with Lockstep, lower merchant fees were a major differentiator. "*For many of the other solutions, merchant fees were higher and not open to integration with existing platforms,*" notes Lucas. Beyond the lower fees, Lockstep's magic link, allowing clients to self-serve and remove the frustration and challenges out of finding and reviewing invoices as well as the ability to make online payments, made this the right solution for The Elks.

Once the process for implementation began for The Elks, it was "*easy and seamless,*" notes Lucas. The full implementation process and the ability to go live with online payments took less than a month.

"Understanding what it costs to scan and process a single check, fees, and time, was a big deal for us. The fact that automation not only creates more efficiencies and saves us money, but we can focus more on who our customers are. The ROI is huge!" -Matt Lucas

Reduced Costs + More Efficient Processes = Key Results

Since implementing Lockstep, The Elks have been able to automate their processes, saving time and money. By leveraging Lockstep for online payments and invoice management, staff time has freed by over 25%, allowing the team to reallocate time for AR staff to prioritize in other areas across the accounting team. The finance team receives fewer calls from lodges about invoices. *"With Lockstep, customers know how to click on the link to look at invoices without us having to tell them what each invoice is for,"* notes Lucas. Since moving to Lockstep, paper checks have been reduced by nearly 40%.

"Lockstep has been really good about helping with unique situations. Lodge Secretaries and Treasurers change our just about every year and the Lockstep team helped us clean our email data so that invoices could go to the correct person at the lodge," notes Lucas. *"The Lockstep team has been open to hearing what I want to do and will do anything possible to make that happen for me."*

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