**CLIENT SUCCESS STORY**

# Accounting Workflow and Staff Efficiency Improvements for The Elks

### COMPANY 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 Collections and activity management workflow constraints

### LOCKSTEP SUCCESS

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

## Key Challenges Impacting The Elks' Finance Team

Automation was a long time coming for the Elks. As a long-standing Sage Intacct customer, emailed invoices for dues and lodge fees are sent out to the individual lodges had become commonplace for the Elks. 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.

## Company Facts

**WEBSITE**
www.elks.org/

**LOCATION**
Chicago, Illinois

**INDUSTRIES**
Non-Profit

**ERP**
Sage Intacct

## About Elks

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."

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.

"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. We wanted to avoid huge merchant fees and wanted to make sure there was a seamless integration with (Sage) Intacct."  Enter Lockstep.

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.

> *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**
>
> **Assistant Controller, Elks of the USA**

## The Elks 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%.

## Words of Wisdom from The Elks

1. Think about everything that your finance department doing now. And think about how much that costs to do something that way, i.e. processes paper checks and a factor in everything. And then think about what an AR automation system costs and what it can do for you.

2. Plan your customer communication and resources plan from the beginning. This will go a long way towards improved technology implementation.

3. 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!

## Request a Demo

**info@lockstep.io**

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