

Gulf Breeze, Florida

Application: Municipal Financial Management
Total Population: 6,000

Software users: 16
Utility Billing Customers: 12,000

Customer Thoughts

“As a small city, we have to find ways to innovate and improve without spending a lot of money. You’ve got to get a lot of stuff done with very few resources. BSA was able to move so much data, that it gave us extraordinary flexibility to revise how we looked at things . . . The time it takes to do a month-end close has gone from days to hours – and the closing entries are down to minutes.

“Our audit has gotten cheaper because we no longer have to rely on tons of files going back and forth, and auditors don’t have to keep asking questions and printing extra paper.”

—Steve Milford, Gulf Breeze Financial Director

Overview

Gulf Breeze, FL was seeking a financial management system that replace it’s “one size fits all” expensive legacy financial software, while giving municipal offices flexible tools at a low price point. After reviewing 12 offers, Gulf Breeze selected BS&A for the flexibility of the program, intuitive design, cost-efficiency, and superior customer service.

Challenges

Gulf Breeze’s legacy system raised prices without offering reliable upgrades or benefits or responding to the town’s needs. The town required customer service assistance that could guide them through a transition and be available for both experienced users and infrequent users. Gulf Breeze needed a system that would support a faster, less expensive audit and provide drill-down capabilities to solve in-depth questions more quickly.

BS&A Solution

BS&A provided Gulf Breeze with the capabilities that they needed at the price they could afford. While transitioning to BS&A Software and putting it into action, customer service support was always available for both minor questions and any difficulties users experienced. The drill-down capabilities offered by BS&A’s software facilitated greater transparency and allowed auditors to answer questions without going back and forth between Gulf Breeze staff members. The flexibility offered by BS&A’s system allowed data to move freely between parties as needed and regular updates gave the system more agility and faster response to demands.

Benefits

By switching to BS&A’s financial management software, Gulf Breeze harnessed a solution that gave them the speed and flexibility that they needed, without sacrificing the character and individual service provided by a small town.

- Month-end close timetable reduced from days to hours
- Auditing simplified, less paperwork and back-and-forth questioning
- Drill-down capabilities expanded and simplified
- In system access to scanned supporting documents
- Regular software updates provide more agility
- Responsive customer service ensures questions are answered quickly
- Cost savings from shorter audits and decreased software fees
- Better accounting and utility billing staff productivity due to better and more flexible software
- Departments (and auditors) use the drill down and document attachment features regularly
- Exporting reports to excel enables staff to actually use the system for further analysis
- Excel export capabilities means no keypunch errors while reentering data



Looking For a Better Way

Gulf Breeze's original financial management software raised prices without offering solutions to the numerous problems the system generated. The city took a hard look at the slow-downs and expenses arising from a system that didn't offer the flexibility that they needed.

Closing accounts at the end of the month required a laborious and time-consuming process with multiple employees entering each debit and credit of each customer by hand. As the original system offered no way to successfully export the information they already had, it had to be re-entered to close the accounts.

Conducting an audit was even more complicated, time-consuming, and expensive. With no way to export information, city employees answered auditor's concerns themselves, going back and forth for days. To provide paper copies of the audit or keep copies in their records, the city could only use antiquated printers and specialized paper, as other printers did not recognize the available format.

While some employees used the system regularly and were familiar with its controls, others used the system intermittently and had to relearn each aspect to complete even a simple task. Adding customer service required extra licensing fees and, when it was available, many employees did not feel comfortable asking questions to unresponsive customer service staff that didn't listen to their questions or concerns. Departments who avoided using the system altogether, created additional workloads for the accounting staff.

While higher licensing fees were implemented with the promise of software upgrades, it did not solve any of the problems the city faced daily, offer any more flexibility, or provide them with any more support. They decided to look elsewhere.

Solving Problems, Fast and Easy

After reviewing 12 demonstrations of each potential provider's program, the candidates were reduced to four. The price further reduced the pool to two, and the promise of helpful customer service with responsive updates showed that BS&A was the right fit for Gulf Breeze. Now fully integrated into the workplace with data converted and backed-up, Gulf Breeze city employees can hardly believe how easy the system is to use and how easily it solves their most difficult problems.

Closing accounts at month-end now requires only a few clicks. With the ability to export data to an XML template, accounts are neat and organized instantly. Employees can complete the task with ease, eliminating tedious data-entry work, and focus instead on the needs of residents.

Auditors require substantially less assistance from employees to conduct a complete and thorough audit. With the ability to export and back-up to different formats, necessary information can be circulated with ease. For paper copies and record keeping, printing can be completed through standard formats used every day. *"95% of the auditor's questions are answered in the drill-down capability of the system,"* said Steve Milford, Gulf Breeze Financial Director.

Customer service is now available for questions large and small, for everyone who uses the software, whether regularly or occasionally. *"You need to understand what life is like when you get good customer service, like BSA offers. Their support team can't be described; it's so good it has to be experienced,"* said Milford. *"Knowing that I can send an email or call for a dumb question or a tough question, and feeling comfortable doing so, changes my willingness so that I actually want to use the software."*



Continuing Success

BS&A is continually evolving to solve problems, and the input from Gulf Breeze helps to move the software in the right direction. If Gulf Breeze does encounter a problem that the software or service staff can't solve, it's time for an update. Regular updates allow the system to respond to the city's needs and address problems as they arise, instead of creating slow-downs and headaches. Remote customer service staff and on-site staff in Florida continue to help Gulf Breeze employees take advantage of all the system's options and capabilities, and develop greater efficiency in the future.

"[BS&A has] gone massively above and beyond any sort of reasonable expectation—they always stand up and say 'we can solve that problem for you.'"

Full Service Software That Actually Serves You

With over 2,000 municipal customers and over 7,500 software installations, BS&A has built a reputation as a provider of responsive software that solves your problems. BS&A software installations include Community Development, Project and Permits, Zoning and Property Maintenance, Inspection Tracking and Scheduling, Financial Management, and many more. Online and mobile tools give customers flexibility to work anywhere, and dedicated customer service and after-sale support staff ensures that each installation is an on-going success. Exceptional service is BS&A's number one priority, ensuring your questions are answered by a real person and an experienced staff member every time, and never locked in voice-mail jail, never sitting in an inbox, and never answered by a computer.

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