



BTM GLOBAL AND NETSUITE

Pursuant Raises the
Bar on Efficiency
and Service

Pursuant is a fundraising and marketing agency that exclusively serves the nonprofit sector. Grounded in analytics and powered by its GivingDNA donor engagement platform, [Pursuant](#) helps people find, engage and give to the nonprofit organizations whose purpose they are passionate about.

Challenge: Simplify and Speed up Financial Operations

An ERP should accelerate the efficiency and growth of an organization, but Pursuant's legacy system was hindering it. The company sought robust and cloud-based financial software to standardize its processes and broaden visibility into operations, thereby strengthening financial decision making, forecasting, and achieving greater accuracy in resource planning.

"We had two overarching goals," said Steve Collins, CFO of Pursuant. "We needed a more flexible and powerful ERP for our financials, alongside a user-friendly visualization solution for time tracking and resource allocation management. And they had to integrate and work well together."

QUICK FACTS

- NetSuite Professional Services Automation (PSA) Software Implementation
- Integration with Kantata resource management system
- Greater resource and financial visibility





Solution: Financial Consolidation and Integration

Pursuant chose the NetSuite Professional Services Automation (PSA) software solution and Kantata for its resource management system.

“NetSuite helped us consolidate our project billing structures and processes, and make them a lot more efficient,” said Jim Wegmann, Controller at Pursuant. “Our teams can get into the granular details of how projects are performing.”

Pursuant partnered with BTM Global to [implement NetSuite](#) and lead the integration with Kantata and other third-party systems. In addition to its deep experience in both NetSuite and Kantata, BTM Global is a fellow professional services company that understands how technologies can be leveraged and optimized for Pursuant’s needs.

BTM’s work included:

- Implementation, consultation and training on NetSuite best practices.
- Configuration of standard and custom NetSuite processes to meet Pursuant’s specific needs.
- Data migration, including loading historical data, that enabled NetSuite to accurately reflect current projects.

“BTM was one of the only NetSuite partners that could design a configuration within both NetSuite and Kantata to give us a true holistic solution,” said Wegmann. “Their expertise brought out the value in each system.”

Results: Immediate Benefits and Preparation for Growth

Pursuant and BTM Global closely collaborated to meet the tight, three-month timeline. The result: A financial system integrated with the Kantata resource management system to accelerate Pursuant’s work, growth, and client successes.

“We told the BTM team that we didn’t want a lot of customizations,” said Garry Arasmith, EVP of Operations at Pursuant. “We wanted to adapt to how Kantata does project management and how NetSuite does accounting and financials. BTM supported us and held that line, which meant pushing back on us at times! But I appreciated that because it gave us a better outcome.”

Speed and visibility for better decision-making

Today, NetSuite delivers a holistic view of Pursuant’s resources and financials. The organization has visibility into current deferred and planned revenue, along with other real-time metrics that enable teams to pivot for the best client and company outcomes.

With more automation and visibility into financials, Pursuant can now bill clients faster and more easily. This frees up the finance team to manage more strategic work rather than manual tasks. In addition, Pursuant has better and more holistic data for financial forecasting.

“We told BTM what our end goal was, and they helped us get there,” said Wegmann. “They figured out how to make NetSuite work for us, and how we could streamline the integrations and make it as user-friendly as possible.”

Supporting a company merger and growth

As Pursuant prepared to merge with Allegiance Group, a fellow fundraising agency, the visibility and ease of NetSuite was essential. “It really helped with due diligence,” said Collins.

“BTM built us the scripts we needed, so now I can do things from a payables perspective for intercompany activity that are much easier,” said Wegmann.

An ongoing partnership with NetSuite managed services

As Pursuant continues aligning operations with Allegiance, it selected [BTM Global's managed services for NetSuite](#). BTM's managed services can include functional, development, and administrative support, depending on a client's needs.

“We've been using the BTM team for NetSuite questions and troubleshooting, and BTM's responsiveness has been really, really good,” said Wegmann. “As we continue merging, BTM will help us integrate and migrate as one agency. That helps our clients make the biggest impact with their budgets. BTM Global has set us up for success and kept our strategic goals in mind every step of the way.”

**Find out more at btmglobal.com
Contact us at 612-238-8800**

