

AAA Western and Central New York

Performance Management Customer Profile



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Quick Facts

- Industry: Services
- Operating since 1900
- Employees: 750
- General Ledger: Campana AXIS
- Based in Buffalo, NY
- Application: Budgeting and Reporting

Background

As an affiliate of American Automobile Association (AAA), AAA Western and Central New York (AAA WCNY) is Upstate New York's largest member services organization that services 25 counties. Best known for offering emergency roadside assistance, the not-for-profit auto club provides travel, insurance, financial and automotive related services to over 880,000 members. AAA has about 70 affiliated auto clubs with 1,100 facilities to serve more than 50 million members across the US and Canada.

Challenges

AAA WCNY faced several challenges including the time-consuming budgeting process in Excel and their limited reporting capabilities. Their previous solution involved seventy department managers who completed their budgets in various spreadsheets, which were then consolidated by Finance and imported into Campana AXIS, their general ledger system.

Campana simplified some of their tasks by automatically balancing transactions between divisions—identifying intercompany expenses and making the necessary debits and credits for each division, eliminating the need for manual entries and balancing—and also performing allocations. However, AAA WCNY needed a solution that would also help budget for these numbers; for example, administrative overhead costs allocations to travel locations are based on percentage of revenue.

Why PROPHIX

Focused on leveraging their accounting system and simplifying their processes, AAA WCNY chose PROPHIX, a solution that integrates seamlessly with their general ledger.

The two-week PROPHIX implementation consisted of more than just the basic financial applications; in addition to setting up PROPHIX for basic budgeting and reporting tasks, the Personnel Planning module was also implemented. This extended the planning abilities to budget for employees by expenses, such as salaries, benefits, and payroll taxes.

Key Benefits

AAA WCNY fully implemented two PROPHIX models: a financial model to track and report on financials and an insurance counts model to store counts for insurance quotes, actual policies, and leads. Storing this data in PROPHIX has given them a structured process and the ability to instantly run a set of prepared reports.

Outside of the pre-defined set of financial statements available from Campana, the auto club can now create additional reports that were time-consuming, error-prone or impossible to create in Excel. The ability to generate their Comparative Report was a major advantage. This report highlights revenue and expenses of major lines of business with accounts and departments combined displayed down the rows—which made an unusual combination but was built easily in a PROPHIX report template. “The speed at which our data is pulled from our GL into PROPHIX is really impressive. Having this data in a user-friendly application streamlines our reporting process, which is what we were missing before,” says Kristy Chapman, Financial Planning and Reporting Manager at AAA WCNY.