

C A S E S T U D Y

## Built-in Logic Makes Sense of Budget Allocations

*Consolidated Services Group, Inc. ("CSG") has more than 25 years experience in the Medical Claims Management industry, and provides Managed Care, Utilization Review, as well as a proprietary PPO to auto liability, workers' compensation and group health insurers.*



### FAST FACTS

INDUSTRY: **Services**

LOCATION: **Lansdale, PA**

REVENUE: **Private**

EMPLOYEES: **360**

ERP SYSTEM: **Sage MAS 200**

### Finding the Right Middle Ground

When it comes to budgeting tools, CSG Assistant Controller Frances Farella has used a lot of them, from a low-tech spreadsheet-based system to high-end software like Hyperion. When the company that she worked for was acquired by CSG, she realized neither was ideal.

When she moved to the combined organization, Farella used Excel to build the budget. "After the first year of using Excel as our primary budgeting tool, I realized it was going to be the last. I couldn't go through another year of Excel. It was painful," Farella said. CSG uses many allocations in its budgeting and finance, to reflect the different branches and shared services of the company. "Excel just couldn't handle the allocations upon which our budget is built. Whenever I had to adjust an allocation, it took forever to make a change and flow things through properly."

Farella went shopping for a solution in between spreadsheets and big-company applications. "I wasn't looking for another 6-figure package. After doing our due diligence, we decided Budget Maestro was what we needed," she explained.

### Allocations Made Easy

With two legal entities — the parent CSG and CHN — and multiple divisions under the corporate umbrella, Finance uses allocations regularly to spread employee time and direct expenses across more than one company or division.

Unlike with Excel, Farella can now manage these allocations and related changes easily. For example, one person's salary could be allocated to five different departments. With Budget Maestro, Farella simply allocates a specific percentage to each one. "If I want to change the percentages being charged to each department, or change the departments in the allocation, I can do it very easily in Budget Maestro and the system automatically recalculates everything. It's a simple process."

**"Excel just couldn't handle the allocations upon which our budget is built."**

Frances Farella,  
Assistant Controller

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**“During budgeting season, our finance staff uses Budget Maestro almost every day. It’s definitely helped us in facilitating the budgeting process. In short, Budget Maestro has been good for us.”**

Frances Farella,  
Assistant Controller

### **Faster, Easier, Better Budgeting & Reporting**

Budgeting and reporting have become a breeze for Farella, who uses Sage MAS 200 as her General Ledger system. Using the Import feature, Farella easily and quickly imports the numbers into Budget Maestro so she can run an analysis of actuals to plan.

Now, when she makes changes to the budget, to the organization or to the allocations, everything flows through thanks to Budget Maestro’s built-in financial logic.

CSG’s department managers are responsible for their own operations and budgets. The Finance team developed custom reports in Budget Maestro for 20 different departments, to help managers track actual vs. budget results. “The reports are built on the templates that come with Budget Maestro, and allows our Finance staff to drill down into their

numbers if needed. It took someone a week to build and prepare those reports in Excel. Now, at the end of the month, the whole process to import actuals and run reports takes two hours at most,” said Farella. “Since we’ve recently implemented Link Maestro for Sage MAS 200, it has even further reduced the time for importing of actuals.”

The improved reporting capability makes the monthly closing of the books easier too. “We’re able to generate our actual vs. budget results within hours after we close, and drill down to analyze significant variance fluctuations.”

“During budgeting season, from September to December, our Finance staff uses Budget Maestro almost every day. It’s definitely helped us in facilitating the budgeting process. In short, Budget Maestro has been good for us.”

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