



Large Church Saves Both Time and Money by Switching to Aplos



THE WELL

CASE STUDY

Brent Taylor | CFO

The Well Community Church



► Challenge

The Well Community Church is a non-denominational, multisite church in California's Central Valley. Brent Taylor, the organization's CFO, makes sure the finances run smoothly so The Well can focus on helping people connect to God and to each other in every neighborhood.

Brent was tired of using accounting software that involved numerous workarounds. "We weren't using true fund accounting software and we had to do extra work to make it work like 'fund' accounting software," he said, and "it involved a number of month-end journal entries and calculations to make it function."

They had been getting by using QuickBooks®. However, "if we were going to expand the number of funds and experience a great degree of complexity, we knew we couldn't manage that in the QuickBooks® Desktop environment," he said. "There was also less clarity in QuickBooks® for the financial reporting, and since it wasn't designed as a true fund accounting software, it didn't allow for easy changes and flexibility to the structure and reporting processes."

What The Well Was Looking For

- True fund accounting
- Efficient software without workarounds
- Functionality for multiple locations
- Clear, intuitive reporting
- Software they wouldn't outgrow

► Solution

The Well needed a platform that could handle a multisite church that employed 82 people and had an annual budget of \$6.1 million, so they chose Aplos.

Brent was excited about the income allocation tool that saves The Well time and is very easy to use. "We use it regularly, which prevents us from having to do a series of month-end closing journal entries. It also accomplishes our fund allocation goals, as we do monthly allocations of funds to our general budget, missions budget, and development budget."

The time savings really carry over to cost savings in the area of staffing. "Aplos' processes and reporting are straightforward without a lot of workarounds, so our staff can remain efficient," he explained.



The true fund accounting structure saves time on report creation as the reporting structure is clear and intuitive.

Brent continued, "Providing analytical information is also much more efficient because we are able to report, track, and budget by fund. This allows for quick access to clear reports and allows us to provide efficient answers to analytical financial questions."

User roles help keep confidential information inside the Finance Department. "I regularly use the reports that allow me to define which accounts can be viewed by each user. This allows us to create a user-specific report, providing them with current information. This has really allowed for a lot of self-service by those using the financial reports to monitor their budgets and view account detail when they need it," he said. "The reporting is also easy to prepare and clear for readers, like our leadership team and elders, to follow and understand."

Brent appreciates Aplos' ongoing support that has been timely and effective. "It's clear that they were listening to their customers because some of the feature recommendations I offered early on when we started using Aplos later showed up in product updates and improvements," he said.

"As our church grows, I can see the software continuing to grow with us without a problem."

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