

Customer Success Story

# Skagit County migrates paper-based budgets to the cloud



**Skagit County**  
**Washington State**  
Government

## Challenges

- Replace paper-based budget process with web-based solution
- Reduce complexity of budget process for both non-finance contributors and finance team
- Improve insight into revenue sources and forecast future revenue

## Why Adaptive Insights

- Excellent value for powerful feature set
- Quick implementation time
- Ease of use

## Results

- Rolled out to 35 users in eight weeks
- Decreased budget cycle by 36%
- Eliminated distribution of paper-based copies of budgets

## Introduction

Skagit County's government branch is a large and diverse organization with over 700 employees and a \$150 million budget. With multiple county services, such as law enforcement, a court system, healthcare facilities, and administrative resources, the organization's needs are varied and complex. As a government entity, Skagit County is not only responsible for providing critical community services but also must comply with numerous legal and fiscal regulations.

## The Challenge

Each year, Skagit County had 50 different budgets, each of which contained more than 30 sub-budgets. Because many of the budget owners came from the court system, healthcare system, and law enforcement, and did not have a finance background, the finance team would spend months running reports, making copies and delivering paper reports to the budget contributors.

Each contributor's budget submission would include the historical actuals data, the current year budget and a six month projection of expenses. Additionally, people would make requests for next year's budget including new programs or additional staff. The finance team would collect these reports and manually enter the data into their financial system before the budget office could actually prepare the plan. This process took more than 11 weeks from start to finish once the reports were distributed.

"State law requires that we have budget control. By law we cannot exceed the budget and must be able to load the budget data into our financial system," explains Trisha Loque, Budget and Finance Director, Skagit County. "Our old process required us to print paper reports from our financial system to distribute to key contributors. This cost our organization countless employee hours and was an inefficient and ineffective mechanism for managing our complex budget."

"By implementing Adaptive and moving our process online, we eliminated manual data entry and paper distribution, decreased our budget cycle by a full month, and saved considerable time and money."

## Customer Success Story

"Adaptive Insights' professional services team was great to work with. They always thought through how they would approach a problem and then came back to us with a carefully worked out solution. In addition, the customer support has been phenomenal and they are always there to answer any questions we may have."

Trish Logue  
Budget and Finance Director

"One of the key features that stood out in Adaptive was the ability to model a complicated personnel structure that included 700 overall employees with different start and end dates, 13 different unions, multiple pay structures, full-time vs. part-time employees, salaried vs. hourly employees, and three different retirement packages."

Trish Logue  
Budget and Finance Director

## The Solution

After evaluating a number of other applications, Skagit County selected Adaptive Planning, part of the Adaptive Suite, because of its powerful features and functions, coupled with a total cost of ownership that offered excellent value. They appreciated the Software-as-a-Service (SaaS) approach that did not require IT resources or the purchase of additional hardware during a lean budget year. Additionally, Adaptive Planning took less time to implement and the user friendly, Excel-like functionality meant user training and adoption would be simple and easy.

"Adaptive Planning was a strong fit for our needs. We wanted the ability to accurately view our revenue sources and forecast our revenue and expenses into the future", recalls Logue. "One of the key features that stood out in Adaptive was the ability to model a complicated personnel structure that included 700 overall employees with different start and end dates, 13 different unions, multiple pay structures, full-time vs. part-time employees, salaried vs. hourly employees, and three different retirement packages."

## The Results

"Adaptive Insights' professional services team was great to work with. They always thought through how they would approach a problem and then came back to us with a carefully worked out solution. There were no roadblocks to the implementation. The application was easy to roll-out and teach. In addition, the customer support has been phenomenal and they are always available to answer any questions we may have" states Logue.

"During our first budget process using Adaptive, we could see who had entered their budget data and who had not. It was easy to find a particular data point or answer to a question by drilling down into the reporting," recalls Logue. "By implementing Adaptive and moving this process online, we eliminated manual data entry and paper distribution, decreased our budget cycle by a full month, and save considerable time and money."

Skagit County now views Adaptive Planning as the critical application that will allow them to prepare forecasts and conduct what-if-analyses during these turbulent economic times. The ability to plan for varying funding scenarios allows Skagit County to maintain a level of visibility and control over spending previously available to them using only Excel worksheets.

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