

Customer Success Story

Intuitive TEK Helps Achievement First Move Beyond Excel for Budgeting



Achievement First

Achievement First is a network of non-profit, high-performing, college-preparatory, K to 12 public charter schools. It believes that all children, regardless of race or economic status, can succeed if they have access to a great education.

Achievement First schools provide students with the academic and character skills they need to graduate from top colleges, to succeed in a competitive world and to serve as the next generation of leaders.



Adaptive Insights enables Achievement First's finance team to spend more time analyzing budgets and less time doing repetitive, manual tasks.

Charter schools need speedy tools to help them forecast their monthly spending and expenses. They also need to be able to develop their budgets for each coming fiscal year. When dealing with a network of schools, Excel just doesn't cut it, and Achievement First (AF) knows this firsthand. Prior to using Adaptive Insights, its finance team used to take a budget model template and replicate it 25 times, one Excel spreadsheet for each of their 25 schools. If one variable changed — like salary — finance would have to make the change manually 25 times. Also tracking the latest version of a spreadsheet was a headache and spreadsheet malfunctions from broken links and formulas were commonplace.

To solve this problem, AF used Intuitive TEK to implement Adaptive Insights. Intuitive TEK helped AF rewrite formulas for financial templates and set up the accounting and payroll integrations to ensure proper data migration.

Now AF can enjoy quick automation for processes that used to take three days of manual updates in Excel. AF estimates the shift to Adaptive Insights saves them over \$100,000 per year simply by eliminating the need to use several budget analysts to manage the old process.

Adaptive Insights has streamlined AF's finance duties. With fewer manual tasks, finance can spend more time on analysis. It can also work with schools on their forecasts in real time (with version control). Additionally, finance can smartly budget with consolidated financial reports, letting school systems compare spending across campuses.

Juggling Excel spreadsheets is a distant memory for AF, thanks to Adaptive Insights and Intuitive TEK.