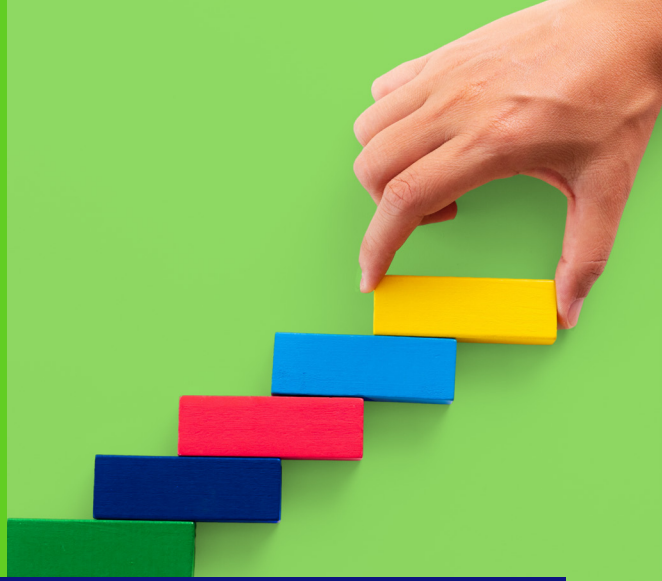




A Unified Approach: AAA Washington Thrives with FloQast and Microsoft Integration



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Founded in 1904, AAA Washington is proud to serve more than one million members in Washington and northern Idaho. The company employs people in a variety of roles supporting their primary lines of business – membership, travel and personal-lines insurance services.



“A major challenge for us was the disparate manner in which information was being tracked,” he recalled. “It was highly manual and came from a number of different sources. Once we had a demo of the FloQast platform, we knew it was the answer. Since then, FloQast has instilled confidence in the source of the information and its storage.”

Ed Lacina, Director of Accounting



INDUSTRY

Travel

ERP

Microsoft Great Plains

OBJECTIVE

Structure the month-end Close to ensure accuracy and timeliness, and to deliver accurate financials to executives quicker.

WHY FLOQAST

- Sought to ensure accurate Closes after an internal audit finding identified room for improvement
- Needed to report financials more frequently to help executives get a better picture of the business
- Wanted to optimize their Microsoft investment with FloQast and its tight integrations with the Microsoft suite of productivity tools

BENEFITS

- The flexibility to report accurate financials to leadership as the Close is conducted
- Standardized the Close, saving multiple business days each month and ensuring optimal documentation for a smooth audit
- Simple implementation and smooth training led to immediate adoption by long-tenured employees

Ed Lacina, Director of Accounting, [AAA Washington](#) knew his team needed to improve their Financial Close before receiving the internal audit finding. Between the lack of visibility, soft close timelines, and, perhaps most frustrating, reconciliations being altered post-approval, he knew things would have to get better. The audit finding illustrated how the company was at a greater risk of mistakes during the Close and recommended implementing a solution like FloQast, to allow for greater documentation and accuracy.

“...A Gazillion Times Easier.”

After identifying FloQast as the right solution, Ed figured it would be up and running in a few months, even after FloQast’s implementation team predicted a more optimistic timeline. So when the implementation was done in just a few weeks, he was floored by how simple it was.

“Our implementation was super well defined and very informative,” said Lacina. “Right from the start, the implementation team was focused and every deliverable was finished on or before it was promised. Their patience and support throughout that process were fantastic. I was blown away at just how organized the implementation was, the timing of it, and, quite frankly, the fact that we didn’t have to do a lot of configuration. Frequent communication and defining clear objectives were key to the implementation process. It was amazing.”

So how did the FloQast implementation compare to others Ed has experienced?

“I’ve been through a lot of software implementations, and this was a gazillion times easier,” said Lacina. “I’ve never had a software company commit to something and actually stick to it. It’s always been overpromised and under-delivered. When FloQast told us that we could be up and running in a month or two, that was the truth.”

The FloQast Effect

As the implementation neared the finish line, Ed admitted that he was concerned about staff buy-in.

“My biggest concern about the implementation was user adoption,” he recalled. “The average tenure on our team is around 20 years, and even as I saw how smooth the implementation was going, I wondered, ‘How in the world are we going to get these people to use yet another software?’ Within one or two months, the team became experts in FloQast. It really showed me that this team could adapt to new resources and learn new skills. It seems like the entire team is much more proactive, and FloQast definitely drove that.”

And, as he observed with his team, it didn’t take long before they started seeing the results.

“I really struggled with knowing where we were at with our Close,” said Lacina. “We use Excel checklists, but if only a few people update them, they’re basically useless. Having



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the [FloQast Analyze](#) tab open and seeing the progress is reassuring for me and means I don’t have to bother anyone asking for status updates. Recently, our CFO asked me how the Close was coming along, and I quickly shared my screen and showed him we were 72% complete. That was all the information he needed. FloQast has helped us change the dynamic of what it means to close our books.”

Better Together: FloQast’s Integration into the Microsoft Ecosystem

One thing that was important to Ed was FloQast’s [integration with Microsoft](#). With Microsoft Great Plains as its ERP, heavy reliance on an accountant’s best friend, Excel, Teams to facilitate remote conversations, and OneDrive for organization, FloQast needed to play well with Microsoft. And it did.

“We view FloQast’s integration with Microsoft 365 as a value-add overlay,” Ed said. “Obviously, we want to leverage these solutions as much as possible to make us more efficient, but consolidating them so that we’re not constantly switching between applications is great.”

The Bottom Line

While the team has relied on FloQast for some time now, with the present market uncertainty, the need to ensure accuracy and report numbers to executives as quickly as possible has become top of mind. With FloQast, Ed said he’s confident he can do that now.

“Considering present economic conditions, FloQast helps us get numbers in front of the leadership team in a more timely and accurate manner,” said Ed. “Now, I can say to my boss, ‘The balance sheet isn’t final, but this is pretty much what you can expect to see when we’re done.’ Before, that information wasn’t final until the close was complete and a financial statement was printed. Because of the market, business leaders are having to make tough decisions on a more frequent basis, and having that timely information has really been key. Having the confidence that we’re getting the numbers to them as soon as possible and knowing they’re accurate is really important for the direction and growth of our organization.”