



### Quick facts

#### Industry

Professional services  
(management services)

#### Company overview

Operating since 1998

#### Head office:

King of Prussia, Pennsylvania

#### Annual revenue:

\$100-\$200 million

**Employees:** 1,000-2,000

**G/L:** Microsoft Dynamics GP

#### ROI

- Leveraging a direct ODBC connection to their accounting system, Microsoft Dynamics GP, automates the flow of their financial data into Prophix on a nightly basis
- Use of Report Binder functionality to compile and automate the distribution of advanced reports
- Development of a personnel planning model via Prophix's Detailed Planning Manager (DPM)
- Valuable analysis of the company's information, providing the finance team with the power to influence operational decision making

[www.tmghealth.com](http://www.tmghealth.com)

*Originally selecting Prophix in order to move away from their reliance on spreadsheets, TMG Health automated their budgeting and, employing a phased approach over time, used Prophix's advanced Corporate Performance Management (CPM) software to streamline a number of important financial processes.*

### Company background

TMG Health is a leading national provider of expert solutions for government-sponsored health plans. The organization's best-in-class technology and subject matter expertise deliver superior results for their clients' mission critical services, including Medicare Advantage, Managed Medicaid, Medicare Part D, and dual eligibles.

### Recognizing the problem

TMG Health relies on their finance department to provide them with accurate reports, and to analyze their data in a variety of different ways that help the company. In the past, the organization completed their budgets using spreadsheets, sending unique templates to each department along with a request for completion, and then collecting those files back for consolidation.

According to Jill Haas, Financial Analyst at TMG Health, "We encountered problems working with spreadsheets, especially with the lack of a direct connection to our accounting software. For one, we struggled to combine departmental budgets or to make revisions. Using spreadsheets for data consolidation proved to be nearly impossible."

The company's finance team realized that they had to move beyond their use of spreadsheets or they would continue struggling to meet their budgeting and reporting requirements. Additionally, by moving to advanced software pre-built to automate important financial processes, they could leverage the tool's flexibility, its ease-of-use, and its potential for interactive analysis. For these purposes, Prophix provided an ideal match.

### Implementing a solution

As Shawn Reed, TMG's Director of Financial Planning & Analysis, explains, "Once we investigated the available options, we had no trouble convincing our team regarding the value of adopting a CPM solution since, at that time, we relied on an unreliable and time-consuming system. We knew that we could automate our budget process and make it much more efficient. Sure enough, Prophix provided us with significant value for our investment."



TMG Health's initial Prophix implementation took approximately two-and-a-half weeks, including one week onsite, one week of remote work, and a few days for follow-up administration. An early step afterward involved securing a direct ODBC connection with the organization's accounting software, Microsoft Dynamics Great Plains. This link ensures that TMG's financial data automatically flows into Prophix, allowing their users to view updated expenses and revenues on a daily basis.

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— Shawn Reed  
Director of Financial Planning & Analysis  
TMG Health

Jill Haas relates, "Prophix offered us support and training throughout the initial implementation. Once we learned to master the tools, we decided to expand our list of applications, so the rest of the implementation came in phases—one project at a time, relative to our needs for budgeting, forecasting, reporting, and planning."

## Benefits

Soon after completing their initial implementation, TMG Health began to enjoy a more efficient, less labor-intensive budget process. Members of their finance team immediately recognized the value of Prophix's direct link to their accounting system, and the accuracy of the information that this connection ensured. This early buy-in helped to pave the way for later developments, as TMG's finance department works within Prophix daily, and all of their data flows through the solution. The organization

has grown their list of applications to include the following and more:

- Balance sheets and cash flow statements
- Advanced reporting, using the solution's Report Binder functionality to compile and automate distribution
- Personnel planning, with the help of Prophix's Detailed Planning Manager (DPM)
- Sales forecasting and revenue analysis

Shawn Reed states, "Our use of Prophix has evolved over the past few years. We can now make changes 'on the fly' using the solution's Ad Hoc Analysis tool, which allows us to instantly view the results of our potential decisions. We also use Prophix to compare our budget figures to actual data. This ability to quickly review our business performance offers us insights that we can use to adjust our operations as needed. I can't overstate the value of being able to put our information to use."

## Future plans

As they had planned when they originally selected Prophix years ago, TMG has used the solution for more than just the evolution of their budgeting process. Even with a full list of financial and operational applications at their fingertips, TMG's finance team plans to address their overhead allocations, develop automated monthly financial reports for their executives, and build a capital expenditures budget that will integrate with the company's operating budgets. Based on their advanced use of Prophix in recent years, we would expect no less.



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