



A Spend Management Implementation Experience



LIL'WAT NATION'S IMPROVED FINANCIAL ACCOUNTABILITY JOURNEY



AN INTERVIEW WITH NEIL MCINNES, DIRECTOR OF FINANCE



About eRequester Web Purchasing & Expense Management

eRequester is developed by Paperless Business Systems a Seattle-based enterprise software developer. eRequester, a web and mobile purchase requisition, PO automation & expense management system, was developed to facilitate corporate accountability and help companies comply with Sarbanes-Oxley requirements.

eRequester has been in continual development, since its release in 1999, and enjoys a broad client base consisting of medium to large sized organizations in the public and private sectors, traditional companies venturing into the new e-business world, as well as non-profits and fast-growing start-ups.

Keep it Simple and Spend Wisely with eRequester.

eRequester is Top Rated by Gartner, an Independent Research Group



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IMPROVED FINANCIAL ACCOUNTABILITY JOURNEY

We had a chance to chat with Neil McInnes, Director of Finance for Lil'wat Nation, and he shared his experience in making financial efficiency and accountability improvements that include selecting eRequester as their spend management system.



Neil McInnes, CPA, CGA
Director of Finance

Lil'wat Nation
www.lilwat.ca

Neil McInnes became the First Nation's Director of Finance in April 2012.

He went on to be awarded the 2015 Business in Vancouver CFO of The Year award in the Transformation Agent Category.

Neil started off our conversation explaining what motivated him to begin his journey.

I would often see stories about companies and organizations that would ignore financial warning signs and/or delay making necessary internal changes designed to protect their financial well-being. They would find themselves in poor financial shape, and often jeopardy, due to inadequate policy enforcement and broken or confusing processes. In the end, they would lose large amounts of money and trust; losses that could have been avoided.

The common threads were striking and clear; strengthen and enforce policies and implement financial safeguards. We knew we were in good shape, but recognized there were places to improve and areas where policies weren't consistently being enforced.

We made the decision to proactively work harder and smarter to build financial sustainability. We were committed to find a way to streamline our processes, enforce existing policies and create a culture of financial accountability to protect our assets for the benefit of our Nation.

"We were committed to find a way to streamline our processes, enforce existing policies and create a culture of financial accountability."

What issues in your business initially made you seek out a spend management system?

We were very much in need of a spend management system that removed our paper-based system. Initially we were referred to eRequester as a way to improve purchasing efficiency and increase transaction visibility between our physically separated departments and programs.

What key problems were you trying to solve?

We were mired in an inefficient paper-based purchasing system with inadequate processes that left us open to missed POs, avoidable late payments and higher financial risk. We made it an organizational goal to move towards paperless spend management with improved controls and visibility.

What business processes were you seeking to replace and/or improve upon?

We needed to get away from the paper-based system and improve our approval workflow. We knew the current system did not meet the needs of our growing organization, and we had to update internal processes to match policies and be timely and responsive. We needed a system that could meet our current needs as well as the changes that we knew were coming. Our accounting system partner had us look into eRequester. We quickly realized the core features were exactly what we were looking for.



What was it that originally attracted you to eRequester?

First would be the routing rules and approval workflow engine. We knew we would be making changes to our internal workflow and adapting over time. The system needed to provide an easy to use and flexible way to manage our routing rules.

Next it would be the mobile interface and the ability to remotely access our system.

Third would be a modification that allowed us to add a direct link within our Sage accounting system. That little customization has saved us a lot of time when researching transactions. Now we always start in eRequester because it has the information we need and is easier to use. Plus, we didn't need to grant unnecessary user access or add licenses to our accounting system.

Out of these, which would you say most influenced your purchasing decision?

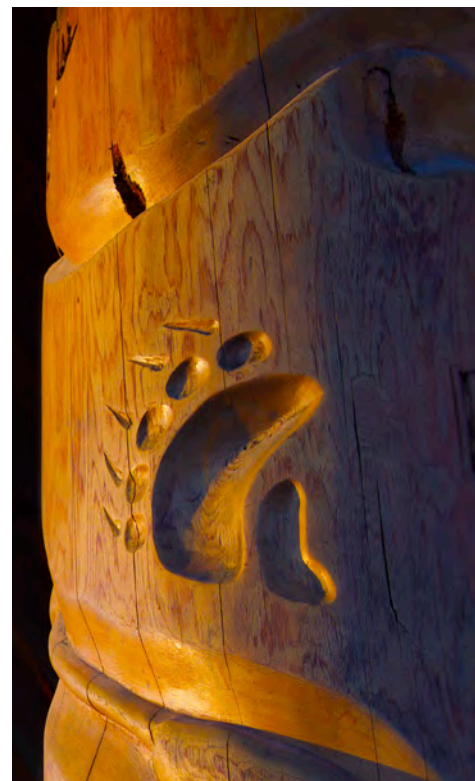
That's a tough one, but I would have to say the mobile and remote access. We needed a faster and more efficient way to manage spending. The ability to instantly research, see what's in process, and drill down into the details from wherever we are has made using eRequester a part of our day-to-day operations.

What was your biggest concern when implementing eRequester?

Our biggest concern was the sheer scope of our internal processes change and whether eRequester could be what we needed it to be. How it would fit our organization was a big unknown. At the time I was a little apprehensive.

Did this concern become reality during the implementation process?

No it didn't. It was a lot to take in though. Let me start with the fact that we were making some big changes. Implementing software like eRequester by itself may seem daunting. Now, add to that the challenges of updating internal processes that lined up with policy and you might have the makings of a perfect storm. (continued on next page)



“eRequester has done everything we expected it to do and more. It has become embedded in our day-to-day operations.”

(continued) We understood our organization and the necessary changes we were making, but needed eRequester to line up with that. We had some hiccups along the way and I really came to rely on our eRequester implementation consultant to provide insights on how best to leverage the capabilities of the system. In the end, we as an organization reached our goals and eRequester has been with us the entire way. It truly has given us the ability to ensure proper spend control that is easy for our users to understand.

[What was the biggest benefit your business saw after implementing eRequester?](#)

It would have to be split between overall organizational efficiency with the routing rules and approval workflow engine and the increased visibility and control. eRequester has done everything we expected it to do and more. It has become embedded in our day-to-day operations.

[How important is this benefit in your day to day operations?](#)

How important is the benefit of improved efficiency, visibility and spend control? It is very important to our organization. eRequester has become the place our people know to find financial transactions. Our departments and programs enjoy the reduced time to process requests and the overall accountability. We as an organization were very happy to see eRequester live up to its expectations and provide us with the needed controls to safeguard our assets. We cannot underscore the benefit of spend control enough.

[What was your organization's overall reception to the implemented changes?](#)

Implementing change is never without its challenges. We were no different. We are a strong group that is focused on protecting the long-term financial health of our organization. There was some initial hesitation, but we were able to show the value of the changes we've implemented and how they benefit the organization. At the organizational level we focused on improving training, increased education about the new processes and illustrated the need to enforce policies to reduce our financial risk.

Special Thanks to Neil McInnes for taking the time to chat and share his experiences. 



The Lil'wat have always been, and always will continue to be,
a people of the land.

The stories our ancestors first spoke in the Ucwalmicwts language of the
Interior Salish people celebrate this understanding.

We welcome you to our land.

We welcome you to the Lil'wat Nation.

Learn more at:
www.lilwat.ca



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