



Blackbaud gains efficiency and accuracy using Support Binders

“The new Wdesk process makes all the teams very happy.”

—JENNIFER **BARTLETT**, SEC Analyst II, Blackbaud

Blackbaud is a cloud software company that powers social good. The company’s SEC reporting team had quarterly challenges keeping supporting materials tidy and organized, slowing down the reporting process immensely. It wasn’t until it came across Wdesk that its problems were solved.

Jennifer Bartlett, SEC Analyst II at Blackbaud, is in charge of the company’s quarterly tie-out process, which includes six documents in each period. Those documents have to be approved by Bartlett’s director and passed along to the internal audit team for further approval. When creating and reviewing the tie-out, Bartlett’s peers often requested to see support documents before they were done.

Company:

Blackbaud, Charleston, S.C.

Business profile:

Blackbaud provides cloud-based technology solutions to nonprofit organizations.

Situation:

The company's SEC reporting team had a paper-based tie-out process that led to inefficiencies and organizational challenges.

Solution:

SEC/SEDAR Reporting, Support Binders

Results:

- Multiple users can access Support Binders simultaneously, which means employees work fewer weekends
- Tie-out creation delays caused by offline supporting documents have been eliminated
- Support Binders, accessible anywhere, has saved time and increased flexibility

Bartlett found herself under pressure to produce a supporting document and get it to the necessary parties, but the manual, offline process made it hard. "I would maybe get a day in the old process before my director would come and say 'What's ready? I need my piece, so I can start my side,'" she recalled.

Enter Support Binders from Wdesk. The automatic online paper trails made it easy for Bartlett, her director, or any other relevant party to find the supporting piece they needed to get tie-outs completed with greater efficiency and accuracy. Before Wdesk, Blackbaud dealt with physical support binders with thousands of pages—if two people needed a support piece at the same time, one was out of luck.

With Wdesk digital Support Binders, multiple users can view a document simultaneously, and documents are easily accessible and well-organized. They can be annotated and marked in a way Bartlett found simple and effective.

"Getting started with Support Binders was so easy," she explained. "It's just like getting a drawing tool. If you have used a drawing tool in any application—it is as simple as finding what you need to highlight, drawing it out, and then keying it in. It is very intuitive."

Bartlett said Wdesk Support Binder keeps things cleaner and more organized than the offline version did, and she loves the ability to have the supporting piece on one screen with the corresponding tie-out on the other.

These Support Binder features saved her from working weekends to meet deadlines and even allowed her director to work from home while recovering from knee surgery. Bartlett now works on her tie-outs uninterrupted, making the process easier for everyone.

"Other teams know they are going to get the link to the Support Binder, and it will probably answer the questions they have for me," she said. "Now they hold their questions. If the support binder doesn't answer their questions, then they come talk to me. The new Wdesk process makes all the teams very happy."