



Bridgepoint Consulting and CFCS

Charitable Organization Saves Time and Gains Access to Data With NetSuite



Catholic Funeral and Cemetery Services is leveraging NetSuite and a partnership with Bridgepoint to improve access to data, eliminate legacy systems and save 40 hours a month for its finance team.

As a full-service provider of end-of-life care for the Catholic community in the Diocese of Oakland, Catholic Funeral and Cemetery Services (CFCS) has some complex business requirements. Based in Pleasanton, Calif., the charitable organization works with cemetery and funeral ministries nationwide, providing education, outreach and professional funeral, cremation and cemetery services in accordance with the followings of the Catholic Church.

A big part of CFCS' mission involves reviewing software systems across dioceses and working to extract data from those platforms. "In the

"We adopted NetSuite to modernize our operations, gain access to data and have homogenous platforms so that we're all working from the same source of truth."

Stephanie Sloane, Director of Analytics, Catholic Funeral and Cemetery Services



funeral industry, software tends to be one of the biggest items that bogs us down, and especially when it comes to access to data,” said Stephanie Sloane, Director of Analytics at Catholic Funeral and Cemetery Services “Through our work with 30 dioceses—and their funeral and cemetery systems—across the country, we inherited a whole host of legacy systems.”

Those solutions ranged from Common Business Oriented Language (COBOL) based systems that produce “green bar” paper printouts, rudimentary DOS systems and Windows, among others. “We’ve seen the gamut of software that’s out there,” Sloane said. “Our goal was to invest in one platform and bring it to the Catholic Church as the best practice and allow ourselves to homogenize systems.”

Left to juggle myriad legacy software systems, CFCS wanted to steer clear of proprietary industry-based software that wouldn’t be able to scale up as the organization grew. “When you’re living on a legacy platform in 2022, it’s hard to tell what that’s even going to look like in 2032,” said Sloane, “and especially as the technology curve continues to speed up.”

Interesting Accounting Processes

The legacy systems used by many cemeteries and funeral homes create what Sloane said are “non-standard accounting and inventory practices. The software drives organizations into those protocols because it’s what the solution can facilitate; it’s how it’s built,” she explained. “We wanted to do some blue sky thinking about the cleanest way to do our accounting and recordkeeping.”

Posing that challenge to the team at NetSuite Alliance Partner Bridgepoint, Sloane said she learned more about how NetSuite was being used in similar settings (e.g. hospitals, hotels, etc.) and concluded that the Enterprise Resource Planning (ERP) platform would be a good fit for CFCS.

“Knowing that NetSuite is a Software-as-a-Service (SaaS) product that would give us all of the improvements that Fortune 100 companies are leveraging, a dedicated team to support incremental improvements and a platform that continues to stay up to date were all important factors in our decision. Additionally, in our selection process, we were excited by the potential of having a full end-to-end ERP system that could handle our needs from CRM to General Ledger,” said Sloane.

Saving 40 Hours a Month

During the early stages of the CFCS’ ERP implementation, Sloane said she was surprised at how many different systems had been introduced to support the existing legacy solutions. Using Excel spreadsheets, tick sheets or another format, the organization had set up repetitive systems throughout its operation. This resulted in a lot of wasted hours spent looking for data and other information.

“From an administrative perspective, we stripped a lot of redundancy out of the process with NetSuite,” said Sloane. “Now, we have just a single entry and create the reports that we need out of that.” The organization’s cash reconciliation process has also been improved to the point that it saves about 40 hours per month. That time was

once spent getting finance team members and operations staff into huddles to try to pinpoint and fix discrepancies.

“Now, we’re doing daily cash reconciliations,” Sloane explained. “At month end, we look for one or two outlying or odd transactions and resolve them. Our month end is no longer this wait, wait, wait, sprint. It’s a much more cohesive process that produces better reports throughout the month.”

Addressing Key Requirements

Working with Bridgepoint, CFCS also automated an inventory management process that was once handled using spreadsheets, paper notes and other manual processes. This was key for an organization that doesn’t just deliver products to end consumers and move onto the next sale, it also has to track those sales and their genealogical histories.

“This adds a sort of ‘legacy component’ to our inventory management process,” Sloane explained. “Fortunately, NetSuite’s custom records allowed us to quickly resolve that and implement an inventory process that converts files into records and allows us to know where everyone is plus where their critical information is housed.”

NetSuite also ensures that none of CFCS’ valuable records are ever lost or destroyed—something that can easily occur when cemeteries use paper and binders to house their historical records. “Those paper records hold a lot of history and important family connections that we’ve been entrusted to keep safe,” said Sloane. “When they

exist on paper in a physical location, all it takes is one flood or fire to wipe those records out.”

A Partner That Speaks the Language

Acknowledging that CFCS’ expertise lies in the cemetery and funeral space, and not in information technology (IT), Sloane said having a partner like Bridgepoint helped carve out a clear path to implementation success.

“Most of the time we had ideal states of where we’d like to go, and then Bridgepoint transformed that into demonstrations within NetSuite so we could tangibly see how things would work,” said Sloane, who adds that most new systems also introduce a new lexicon. Bridgepoint also helped CFCS get up to speed quickly on that new language.

“Having a partner that speaks that language and can easily translate it for us,” said Sloane, “was probably the most critical part of that journey.”



Company Snapshot

Company: Catholic Funeral and Cemetery Services

Location: Pleasanton, Calif.

Industry: Religious Institutions



Partner name: Bridgepoint Consulting

Location: Austin, Texas

