



Prophet One &
Catholic Order of Foresters

Achieve Digital Transformation With NetSuite



Working with Prophet One, Catholic Order of Foresters replaces its aging ERP with a cloud-based platform that supports its entire operations.

Founded in Chicago in 1883, Catholic Order of Foresters is a fraternal benefit society that provides individual financial security solutions to its members while supporting the Catholic community through fraternal outreach. An organization originally founded by and to support impoverished immigrants coming to America, the fraternal benefit society is licensed in 32 states and Washington, D.C.

The organization grew out of very humble beginnings thanks to 42 people who saw a need in their community and collaborated to address it. Today, those same themes of addressing a need and collaboration are evident in Catholic Order of Foresters' home office and among its membership.

“We’re a small organization, so we always need support. We need a partner that understands that at times we may want them to carry the ball through part of this implementation or do some additional work.”

John Hillebrand, Senior VP of Finance, Catholic Order of Foresters



“Integrating data is seamless with NetSuite. That will definitely free up some time. Instead of having to manually enter everything into Microsoft GP, we’ll just be integrating directly into our new NetSuite cloud ERP system.” John Hillebrand, Senior VP of Finance, Catholic Order of Foresters

Filling a Real Need

With 85 employees and more than 100,000 adult and youth members, the Catholic Order of Foresters offers term life, whole life, universal life and annuity policies. John Hillebrand, the organization’s Senior VP of Finance, said its origins were straightforward: when families lost their breadwinner, friends and neighbors typically collected money to assist survivors financially.

“Those friends and neighbors agreed that upon someone’s passing, a certain amount of money would go to each survivor,” said Hillebrand. “The goal was to provide financial stability for the group, which is how many life insurance companies were founded at the time.”

As the Catholic Order of Foresters’ membership grew, the society added new ways for its members to gain financial security by creating “opportunities for spiritual, social and charitable growth,” said Hillebrand. All members are assigned to a court system that drives activities like meal packs, book drives, fundraisers and other charitable activities at the local level. The organization even offers alternative breaks for students and mission trips for adults.

Tackling Tough Challenges

As a life insurance provider operating in a low interest rate environment, Catholic Order of Foresters is facing challenges as it matches its investment to mortality rates. Due to the low interest rates, many higher-rated investments are either being called or paid down faster than insurance products are right now. “That’s put a strain on profitability, we decided to invest in new cloud-based technology where we could predict costs easily,” Hillebrand said.

As the organization continues to grow, it has had to update its operational systems in order to accommodate that expansion. With being designated as an essential business that didn’t have to close up shop during the pandemic, Catholic Order of Foresters was able to maintain normal operational levels by allowing many of its employees to work from home.

Once remote, these associates began to encounter issues using the organization’s enterprise resource planning (ERP) platform and its virtual private network (VPN). Its on-premises Microsoft Great Plains (GP) solution was in place for over 20 years and lacked innovative enhancements and functionalities.

“Microsoft GP on-premises works less than optimally over a VPN, so the connection wasn’t great for anyone who was working from home,” said Hillebrand. “Plus, Microsoft isn’t investing substantially into the system, so there were few upgrades and enhancements available.”

A Solid Partnership

Wanting a cloud-based accounting system that could be accessed from anywhere with high levels of system uptime, Catholic Order of Foresters thoroughly reviewed NetSuite, Sage Intacct and Acumatica as potential options. From its new cloud-based system, the organization wanted assurances that it would be prepared for the next disruption (i.e. global pandemic or otherwise), a stable platform for its remote workforce, and the ability to work on multiple screens at once.

Specific to the accounting function, Hillebrand was looking for a solution that offered a comprehensive approval workflow. “Microsoft GP didn’t really have one that worked for us,” said Hillebrand, who instantly liked NetSuite’s approach to approval workflows and the checks and balances it creates within the system.

Once NetSuite ERP is in place, Catholic Order of Foresters will be using the ERP’s general ledger, accounts payable, procure-to-cash, procure-to-pay and purchase order modules. Working with NetSuite Solution Provider Prophet One, the organization customized some of its screens to include user-defined fields.


“As a life insurance company, we follow statutory accounting rules (versus GAAP accounting),” said Hillebrand, “so we made some enhancements to the ERP and connected certain accounts so we can use them in certain exhibits within our financials.”

Hillebrand said Prophet One provided good support throughout the implementation process and also filled in where called for to address any issues that came up during that period. “Prophet One has been helpful through the whole process of checking in and seeing how everything’s going,” said Hillebrand.

There’s Much More to Come

Along with the enhanced approval workflow that NetSuite provides, Hillebrand is also looking forward to a more streamlined audit process, clearer segregation of duties and better user roles management. Other anticipated benefits include the ability to see exactly who created an invoice or batch of invoices, flag any potential issues with those invoices, and then follow through on those inquiries before sending them out to members.

For Catholic Order of Foresters, Prophet One also built a direct integration to the organization’s expense management software, which it uses for travel, expense and invoice management.



**CATHOLIC ORDER
OF FORESTERS**

Company Snapshot

Company: Catholic Order of Foresters
Industry: Nonprofit
Location: Naperville, Ill.



Partner Name: Prophet One
Location: Indianapolis, Ind.