

Sage 500 ERP | Customer Success

Applause for Sage 500 ERP at San Francisco Opera

Carmen. Aida. The Magic Flute. Over the years, millions of music aficionados have enjoyed masterpieces such as these at the San Francisco Opera, one of the world's most acclaimed and best-loved opera companies.

San Francisco Opera prides itself on a rich and varied repertoire, with 10 to 11 different productions and over 80 performances on its main stage every season. Because opera is such a complex art form, each performance requires mind-boggling logistics. Star singers, orchestra, chorus, dancers, lighting, scenery, costumes, publicity, and ticket sales are all carefully coordinated, so that multiple productions can be running and in rehearsal phases at any given time. The result of meticulous organization is evident when the curtain goes up, and the audience is spellbound by the company's illustrious performers and the power of their artistry.

Behind the Curtains

The finance department within the San Francisco Opera faces a monumental task every season, tracking and reporting revenues and costs of main stage productions, documenting costs of educational and other programs, and accounting for ticket sales, contributions, and other sources of revenue. Forecasting is a crucial task, as individual line items for each of 18 departments, 82 subdepartments, and 11 productions must be budgeted at least three years in advance.

The opera's accounting structure reflects the diversity of the company itself, with vastly different requirements for each department, and hundreds of separate accounts for specialized needs. The technical department may track carpentry, electronics, sound, and painting costs, for instance, while the costume, wardrobe, and wig department tracks costume design, production, and fittings. Departments must budget and assign costs to numerous productions in current and future fiscal years. A sophisticated system is needed to organize this tremendous volume of complex information.

*Sage 500 ERP was named Sage ERP MAS 500 when San Francisco Opera initially implemented this solution. The product names have been updated in this case study to reflect current naming.

Customer

San Francisco Opera

Industry

Nonprofit arts organization

Location

San Francisco, California

Number of Locations

One

Number of Employees

125 full-time, year-round
1,000 seasonal

System

Sage 500 ERP



Challenge

Replace old system with a sophisticated business solution that can provide advanced reporting, forecasting, and revenue and cost tracking for a complex \$56 million operation.

Solution

Sage 500 ERP* financial modules.

Results

Comprehensive reporting, auditing, and analysis; easy customization; complete management of 20,000+ active accounts; precise cost and revenue tracking; improved forecasting; more strategic management.

World-Class Performance

Mark Gorman, controller for the San Francisco Opera, led an interdisciplinary team in investigating several business management systems to replace an outdated accounting package. They selected Sage 500 ERP for its overall flexibility and comprehensive reporting features and went live with the new system on the first day of the new fiscal year.

“Sage 500 ERP gives our accounting staff a user-friendly means of producing high-quality work quickly and efficiently,” notes Gorman. “It provides sophisticated reporting tools that allow us to develop meaningful management reports on a timely basis.”

Gorman cites the design of Sage 500 ERP accounting structure as one of the key features that distinguish it from many other software packages in its price range. “We can define various segments for our departments, subdepartments, accounts, and productions, and combine values from each segment to create individual accounts. This table-driven structure greatly reduces the likelihood of creating erroneous accounts. We can accurately maintain more than 20,000 active accounts. Using this large and highly organized account structure, we are able to develop a wide variety of financial reporting models.”

Before the advent of Sage 500 ERP at the Opera, financial statements derived directly from the accounting system were limited to a few basic reports. More complex analyses had to be done manually or through spreadsheets.

“Now we are able to design special reports as needed,” explains Gorman. “We can now track costs for each department by opera production. Any anomalous information jumps right out at us. If an account has a large balance when it shouldn’t at a particular time of the production cycle, we can check into the matter and take immediate action.”

“A world-class opera company must maintain a high level of excellence and sophistication in every aspect of its operations. Sage 500 ERP helps us achieve that goal.”

Mark Gorman, controller
San Francisco Opera

Before acquiring Sage 500 ERP, the Opera prepared financial statements in an audited format only once a year. Now an automatic report is generated every month. The result is a high-level financial overview available throughout the year. Gorman says that this will improve management of the organization’s financial resources, and help prepare for the annual year-end audit.

“I’m definitely happy with the choice to go with Sage 500 ERP,” Gorman notes. “A world-class opera company must maintain a high level of excellence and sophistication in every aspect of its operations. Sage helps us achieve that goal.”

About Sage

Sage North America is part of The Sage Group plc, a leading global supplier of business management software and services. At Sage, we live and breathe business every day. We are passionate about helping our customers achieve their ambitions. Our range of business software and services is continually evolving as we innovate to answer our customers’ needs. Our solutions support accounting, operations, customer relationship management, human resources, time tracking, merchant services, and the specialized needs of the construction, distribution, manufacturing, nonprofit, and real estate industries. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs 12,300 people and supports more than 6 million customers worldwide. For more information, please visit the website at www.SageNorthAmerica.com or call 866-996-7243. Follow Sage North America on Facebook at: <http://www.facebook.com/SageNorthAmerica> and Twitter at: <http://twitter.com/#!/sagenamerica>.