

JMT  
CONSULTING



How JMT Can Help You JumpStart Your Nonprofit's Back Office Efficiency

# Rob Johnson, Chief Revenue Officer,

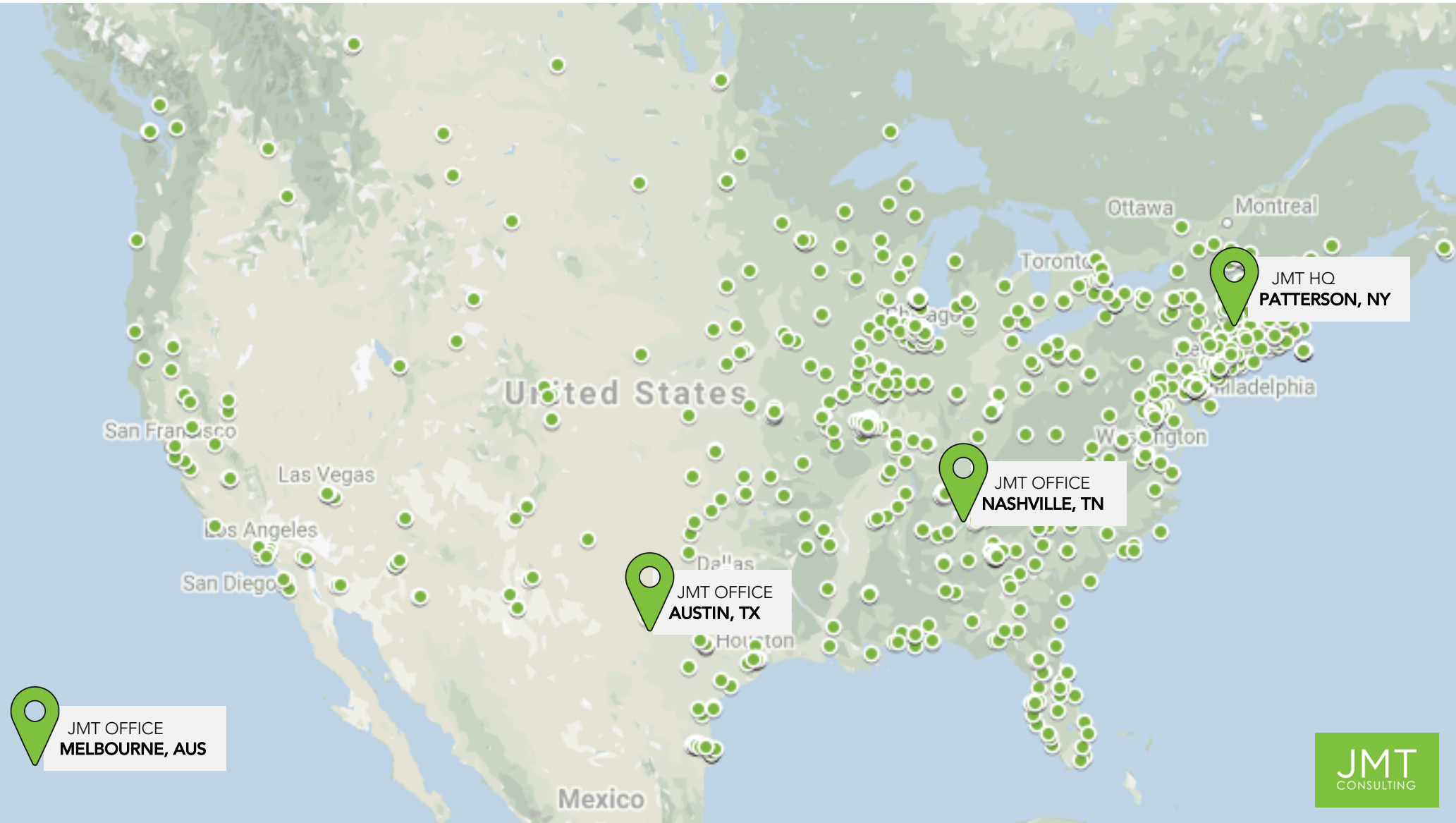


# JMT's Namesake, Founder & Current CEO


Jacqueline M. Tiso




- Served as CFO and Comptroller for numerous nonprofit organizations
- Helped nonprofits with all financial aspects of their business – accounting to technology to high-level management and board consulting
- Founded JMT in 1991 with the goal of helping nonprofit organizations achieve better outcomes, after seeing firsthand how many of them struggled to implement the correct technology



 JMT OFFICE  
MELBOURNE, AUS

 JMT OFFICE  
AUSTIN, TX

 JMT OFFICE  
NASHVILLE, TN

 JMT HQ  
PATTERSON, NY





**UNITE  
HERE!**

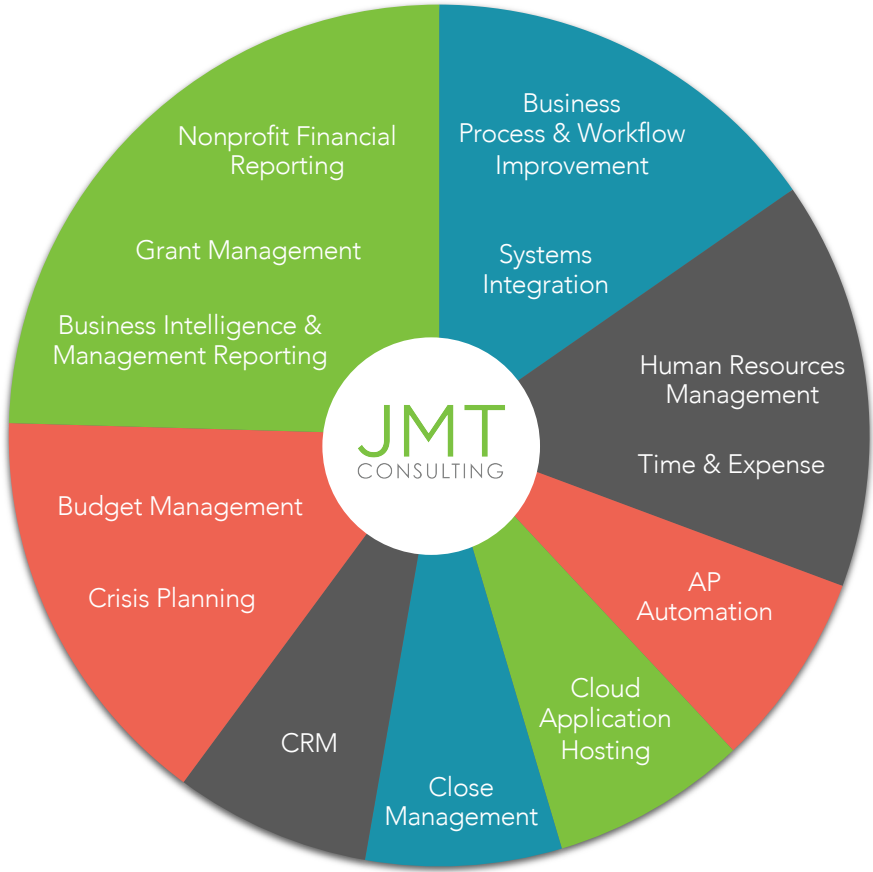


Housing Assistance Program of  
Essex County





# How We Support Nonprofits



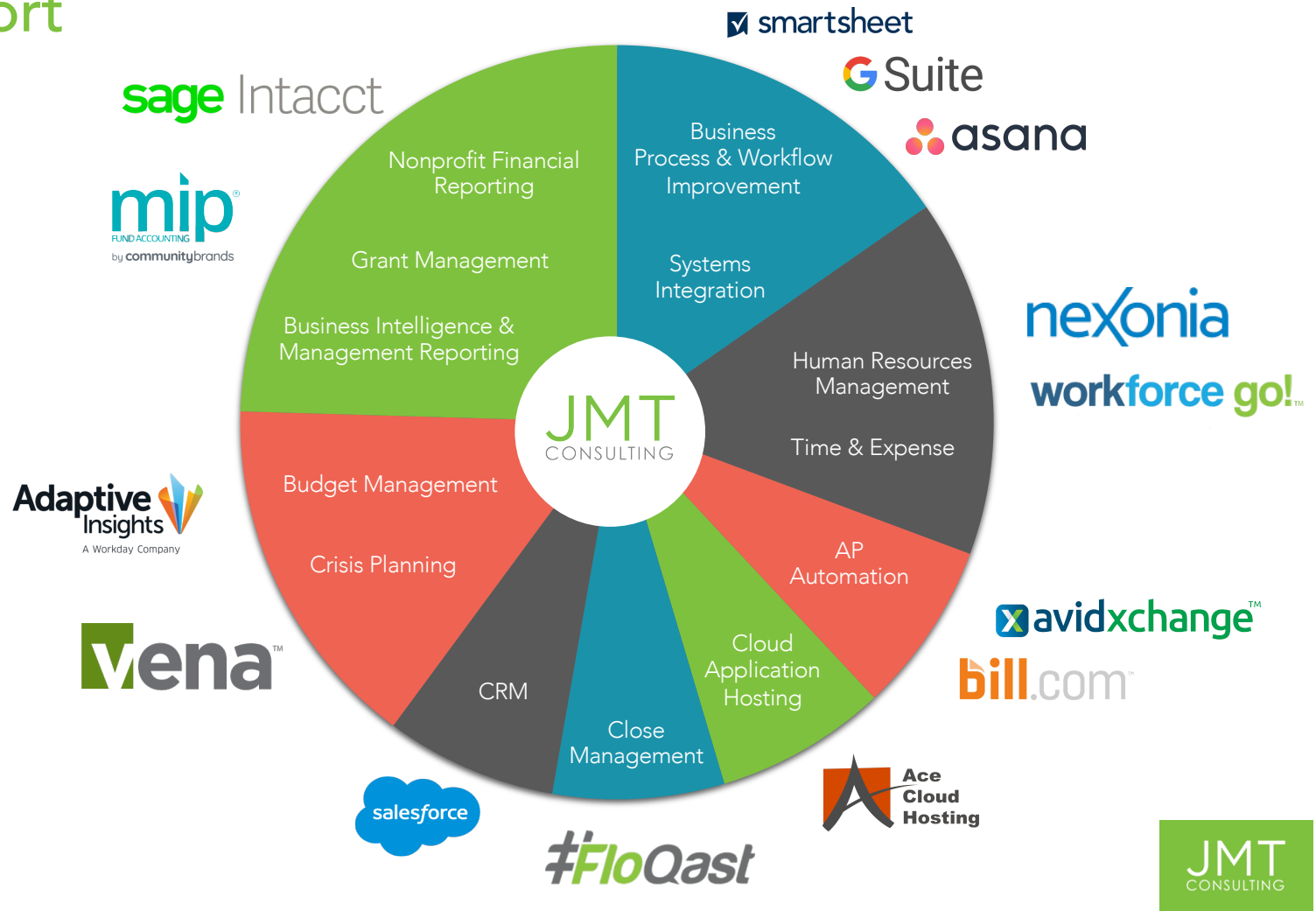
# The Paradox of "Safe Mode"





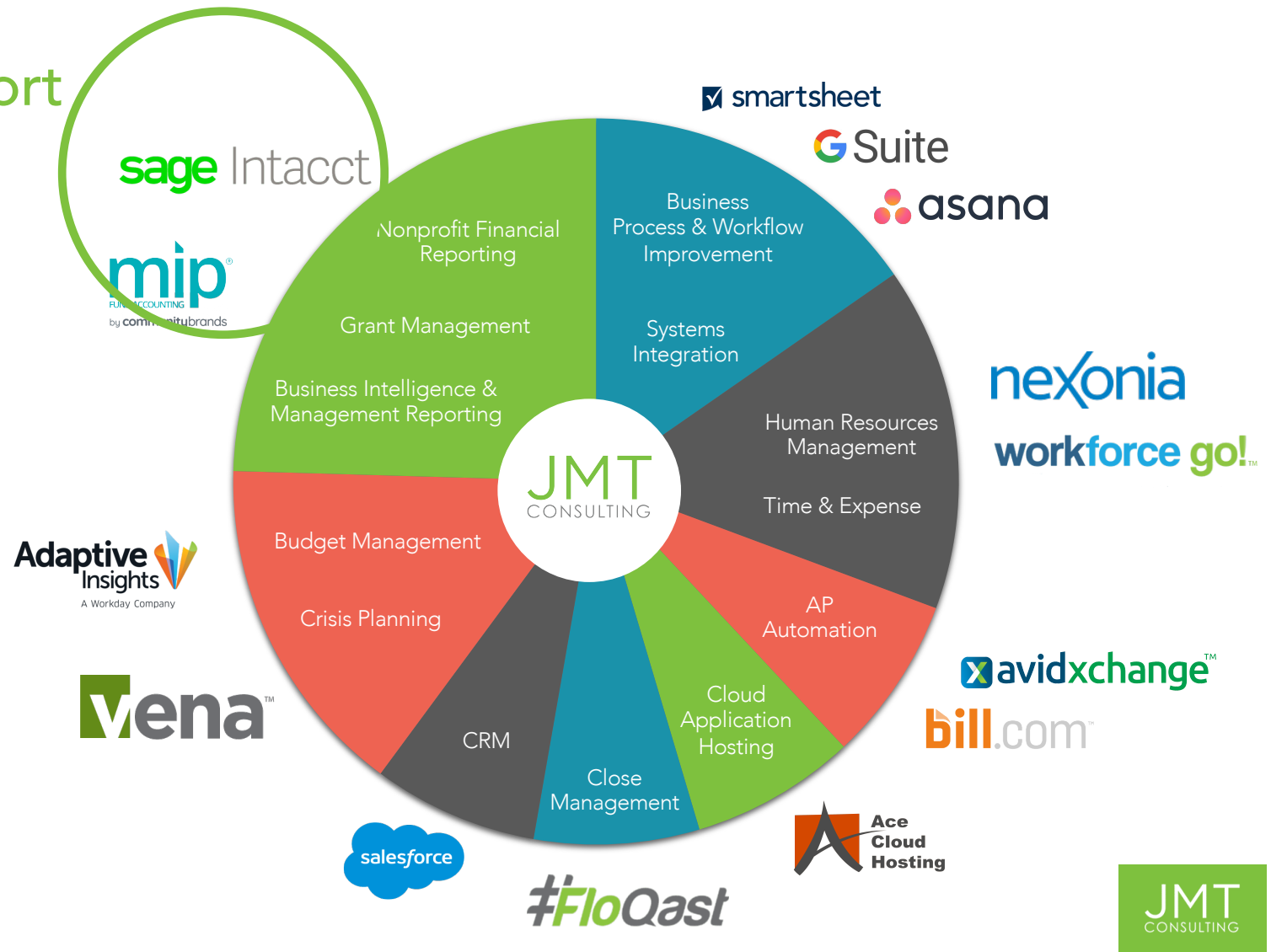
# How We Support Nonprofits

Our Technology Ecosystem



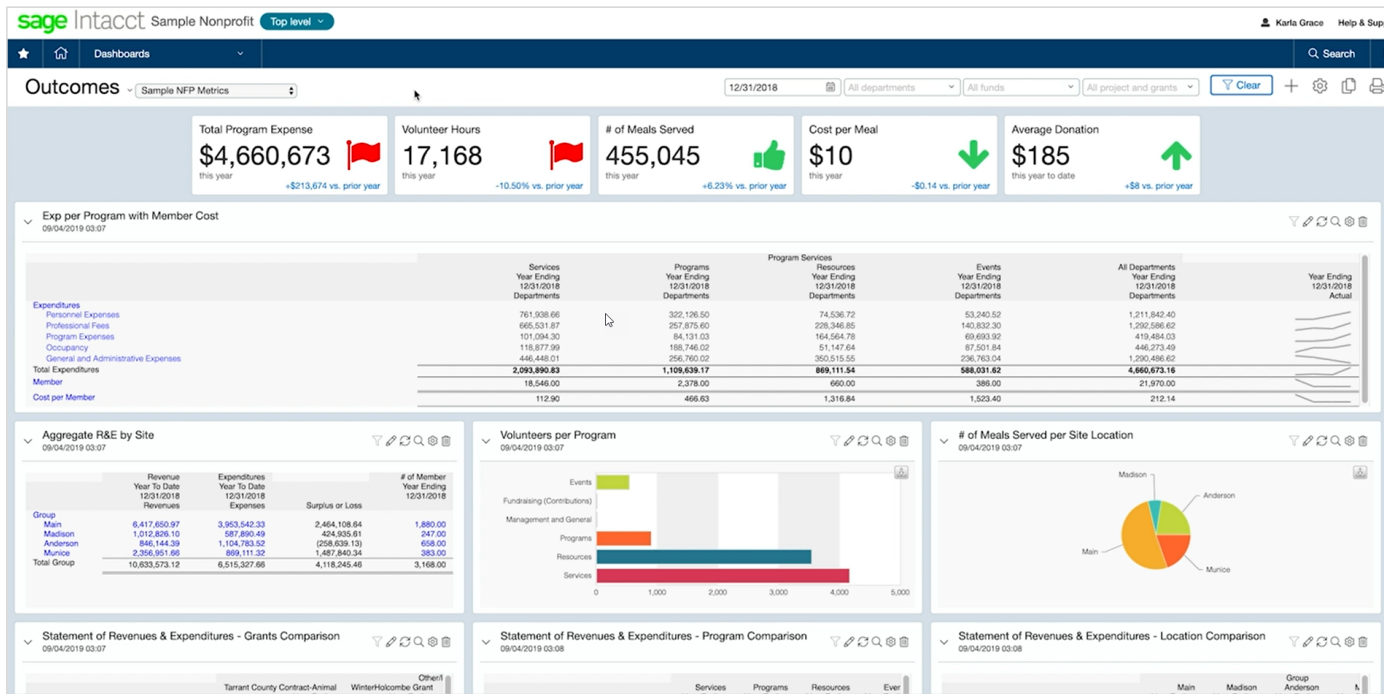
# How We Support Nonprofits

Our Technology Ecosystem





The leading accounting and financial management software. Automate your most important processes, reduce your reliance on spreadsheets, and give you greater visibility into your real-time business performance.



The first and only AICPA preferred financial management solution.

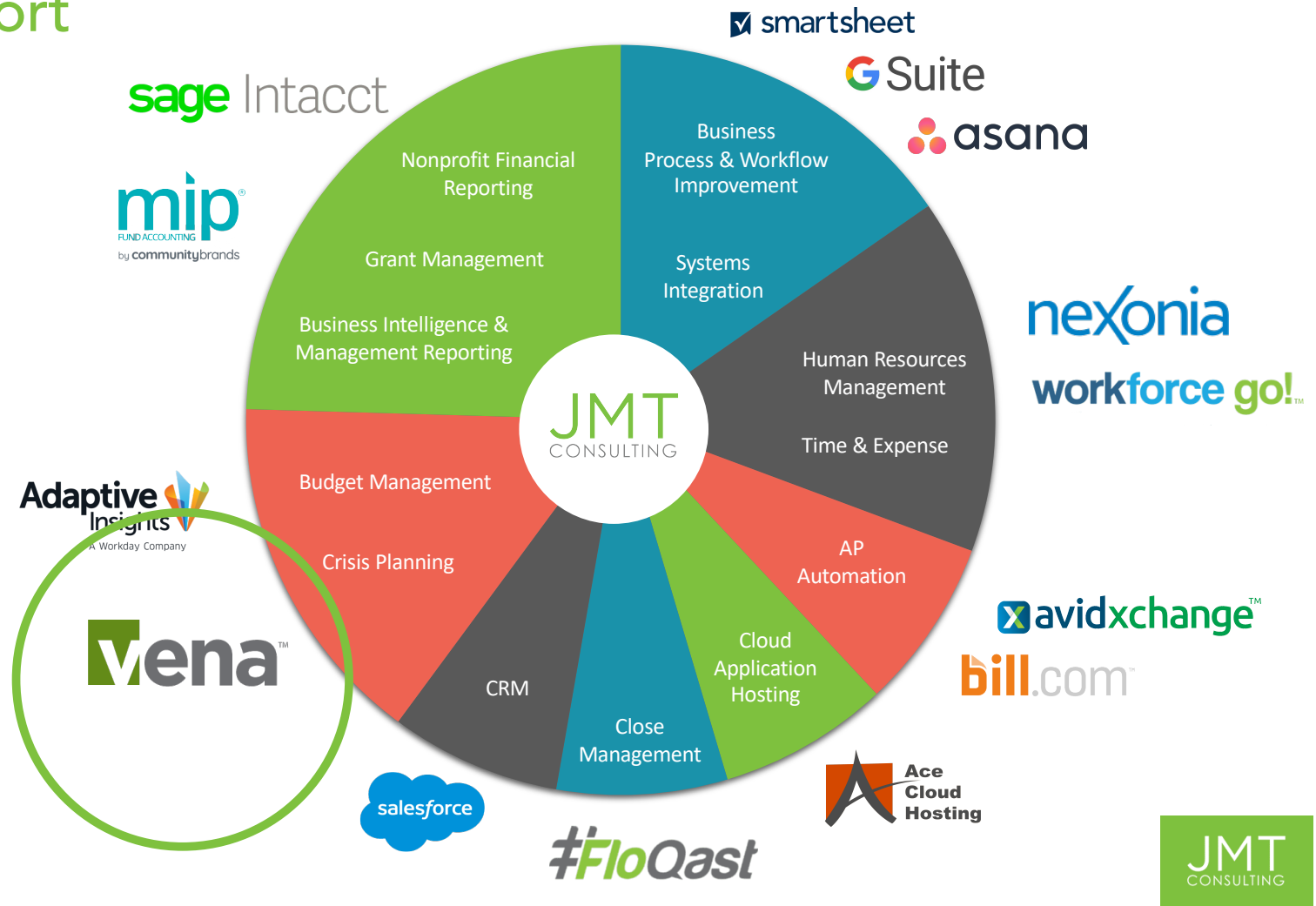


Rated #1 for customer satisfaction by G2.



# How We Support Nonprofits

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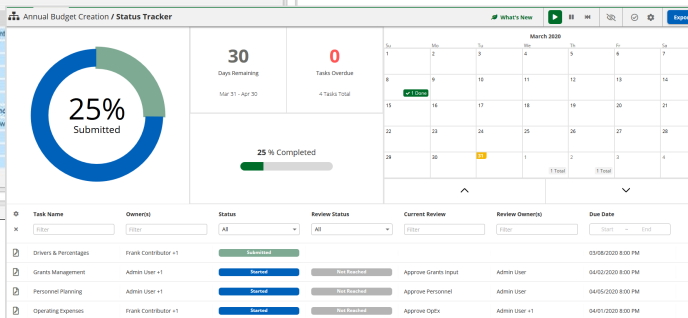
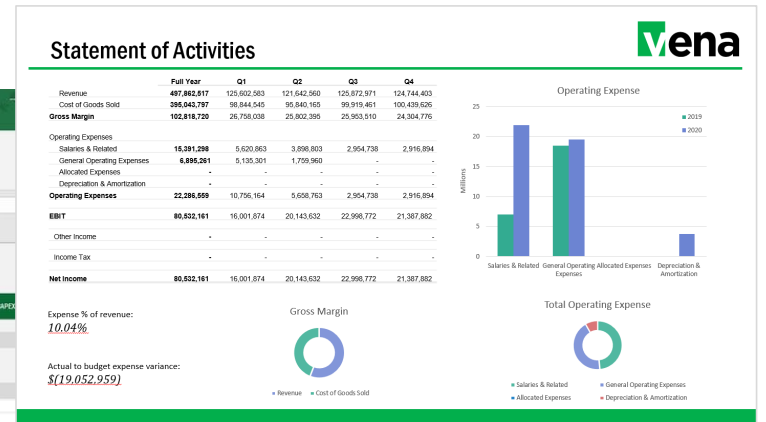


Like Excel, but more powerful. Vena's fresh approach to CPM connects your Excel spreadsheets, templates, formulas and models to a central database governed by a sophisticated workflow engine and business rules.

2020 CapEx Input Budget

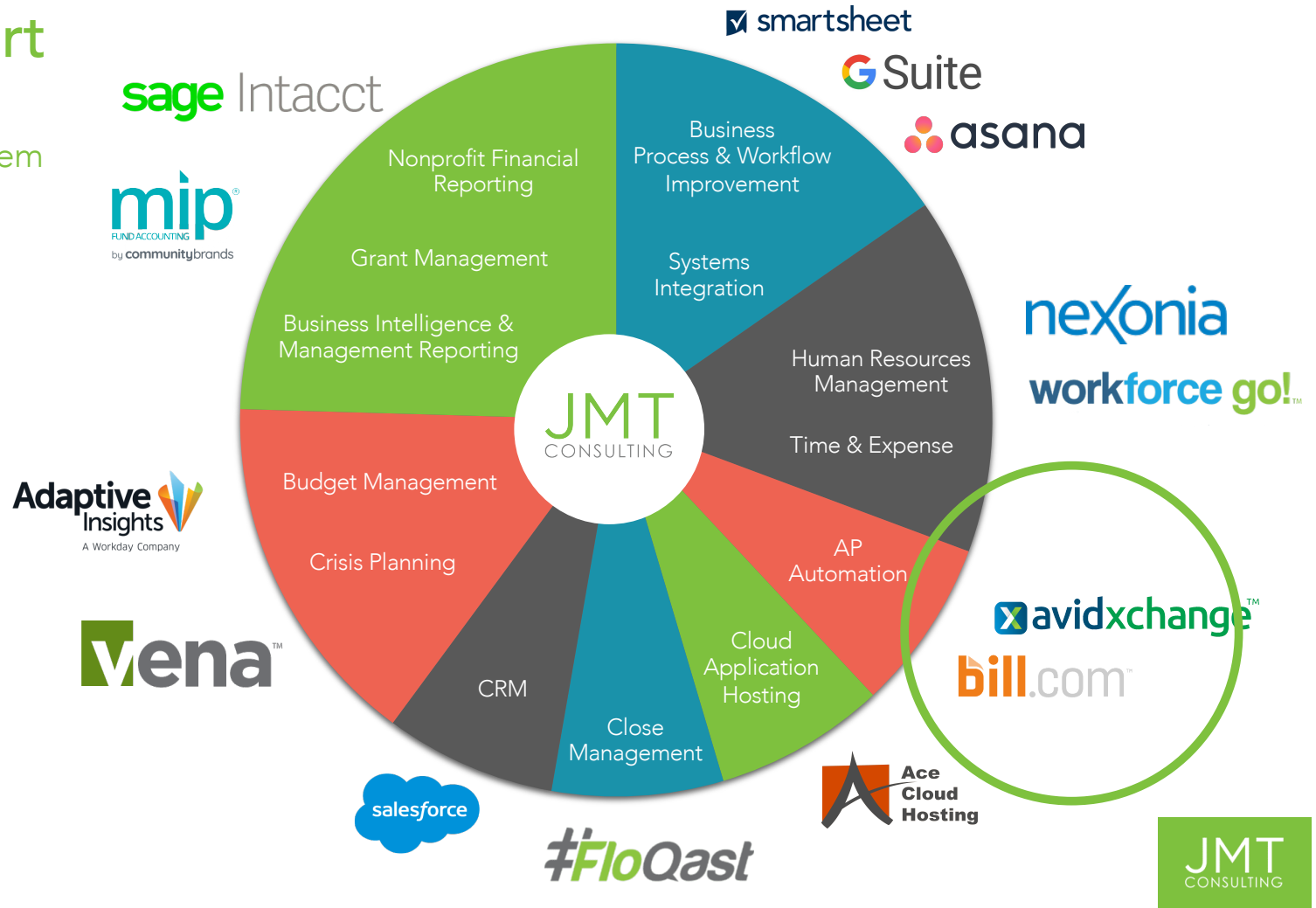
220 (New York) D10 (Sales & Services) USD

Asset Description	Asset Type	Purchase Date	In Service Date	Asset Termination Date	Purchase Price	Asset Life	Depreciation Method	Requested by	Justification	Priority	Approval	CAPEX
Validation Check (All Fields Completed)												
<b>Existing Assets</b>												
* Details Synced from Fixed asset system												
220 (New York)	D10 (Sales & Services)	EAD1	New Desktops for Finance	Type 03 (Equipment & Software)	12/1/2016	2/1/2020						456,197
220 (New York)	D10 (Sales & Services)	EAD2	365 Licenses	Type 03 (Equipment & Software)	12/15/2016	3/15/2020						
220 (New York)	D10 (Sales & Services)	EAD4	Adobe Suite Licenses	Type 03 (Equipment & Software)	8/19/2018	10/19/2018						
220 (New York)	D10 (Sales & Services)	EAD5	Plumbing in White 4	Type 06 (Leasehold Improvements)	8/22/2018	11/22/2018						
220 (New York)	D10 (Sales & Services)	EAD6	New Bikes & Carpooling	Type 08 (Leasehold Improvements)	4/20/2018	7/20/2018						
220 (New York)	D10 (Sales & Services)	EAD7	Whse 4 Adjoining Lot	Type 01 (Land)	7/20/2020	9/20/2020						
220 (New York)	D10 (Sales & Services)	EAD8	x2 Company Cars	Type 04 (Vehicles)	2/9/2020	5/9/2020						
220 (New York)	D10 (Sales & Services)	EAD9	Office Expansion	Type 02 (Buildings)	5/11/2019	8/11/2019						
220 (New York)	D10 (Sales & Services)	EAL0	Boardroom Renovation	Type 08 (Leasehold Improvements)	5/13/2020	7/13/2020						
<b>Future Assets</b>												
* Error Details on Forecasted Asset Positions												
220 (New York)	D10 (Sales & Services)	FAD1	Laptop Laptops (x2)	Type 03 (Equipment & Software)	3/1/2020	4/1/2020						876,000
220 (New York)	D10 (Sales & Services)	FAD2	New Wiring for East Wing	Type 06 (Leasehold Improvements)	8/1/2020	9/1/2020						
220 (New York)	D10 (Sales & Services)	FAD3	New CLAP Software	Type 03 (Equipment & Software)	6/1/2020	6/1/2020						
220 (New York)	D10 (Sales & Services)	FAD4	Plumbing in Lot 6	Type 06 (Leasehold Improvements)	5/15/2020	6/15/2020						
220 (New York)	D10 (Sales & Services)	FAD5	F-150 Trucks (x5)	Type 04 (Vehicles)	1/1/2020	2/1/2020						
220 (New York)	D10 (Sales & Services)	FAD6	Category Car	Type 04 (Vehicles)	3/1/2020	4/1/2020						
220 (New York)	D10 (Sales & Services)	FAD7	Office Expansion, 2 units	Type 02 (Buildings)	3/1/2020	6/15/2020						
220 (New York)	D10 (Sales & Services)	FAD8	New Vehicle	Type 04 (Vehicles)	3/1/2020	4/1/2020						
220 (New York)	D10 (Sales & Services)	FAD9	K450 Forklift	Type 05 (Machinery)	10/1/2019	10/1/2019						
220 (New York)	D10 (Sales & Services)	FAL0	New Building									



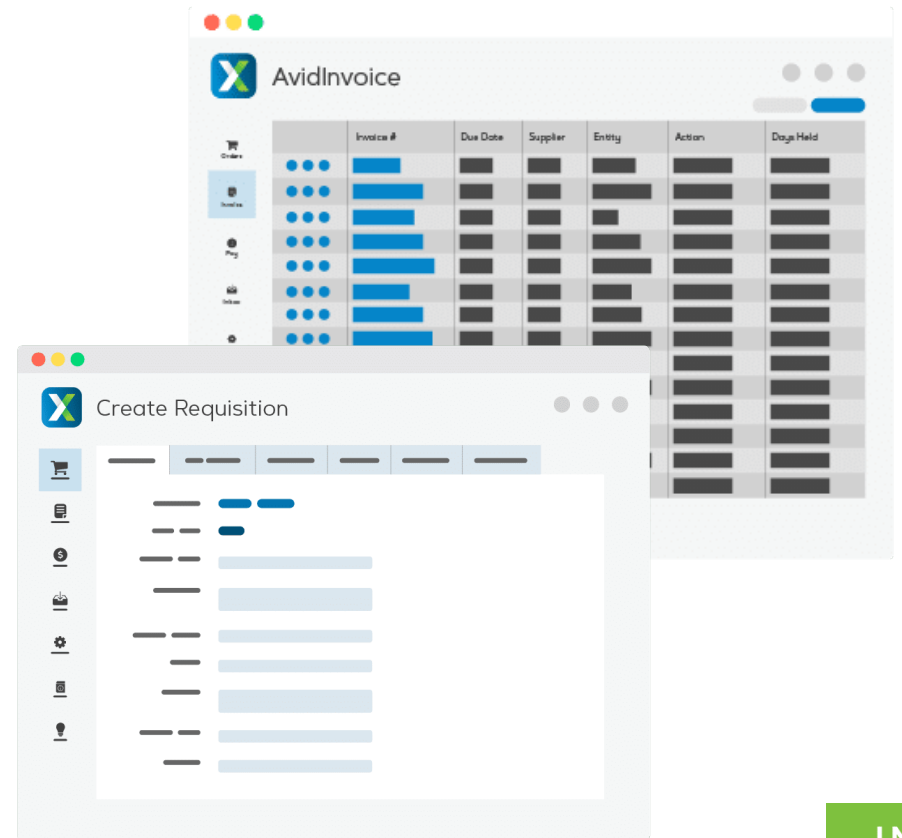
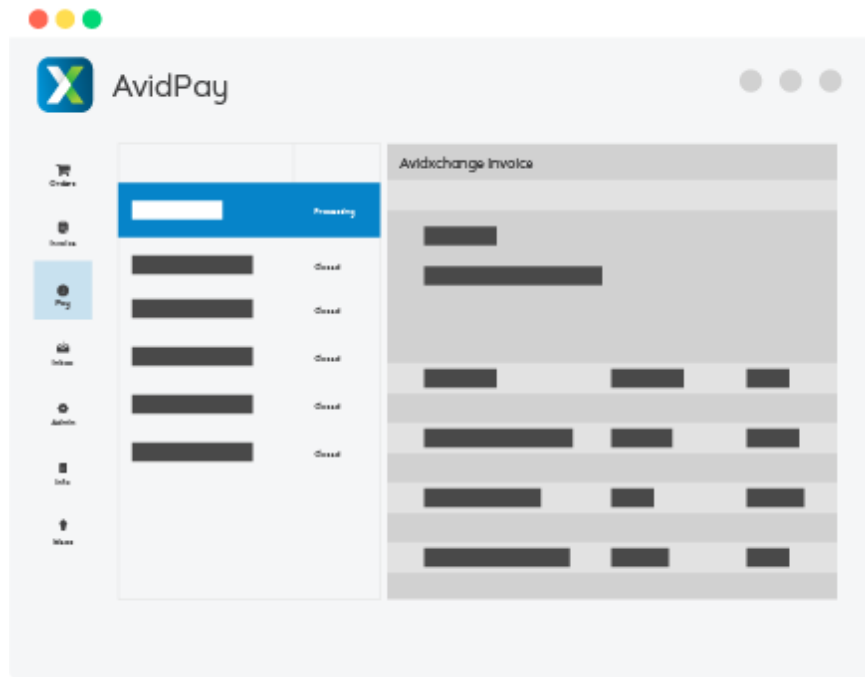
# How We Support Nonprofits

Our Technology Ecosystem



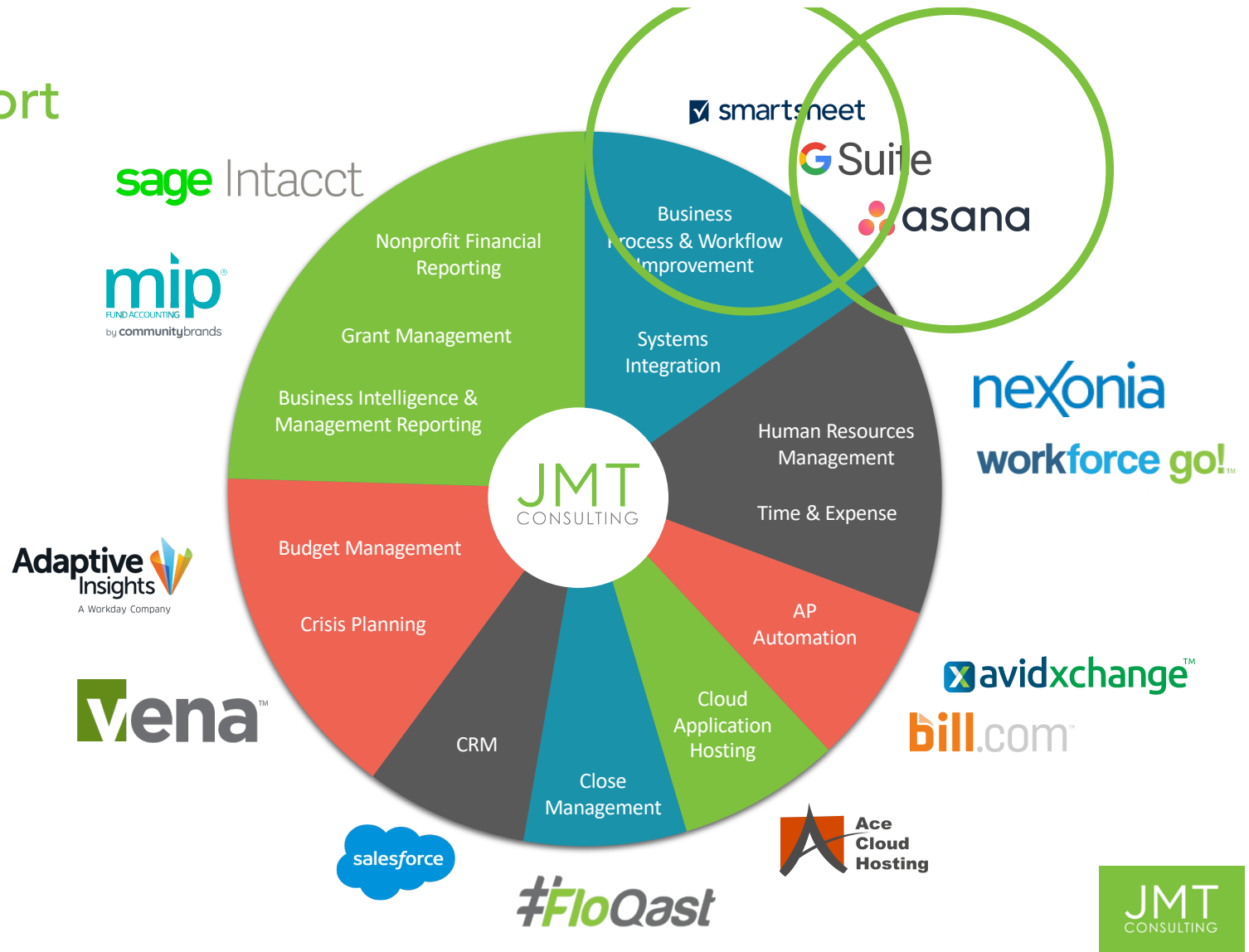


Automate your accounts payable and payment process, liberating your AP from the endless paper chase that's eating up time and money and replacing it with a digital application that provides you with 24/7 on-demand access.



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Get updates from teammates, organize tasks and projects for work, or manage your to-do list for the day.

MY TASKS INBOX DASHBOARD Search Apollo Enterpris...

Website launch

Board Conversations Calendar Progress Files

- Backlog**
  - Final QA (Dec 30)
  - Forms submit data properly
  - Links across pages
- Ready to do**
  - CSS/HTML validated (Dec 19)
  - Videos have updated branding (Dec 29)
  - Tracking codes inserted
  - Mobile-friendly site parallels (Dec 22)
  - XML sitemap submitted (Dec 23)
  - Auto-responses working (Dec 28)
- In progress**
  - Sync with Google Analytics (Nov 30)
  - CSS is optimized (Today)
  - SEO keyword optimizations (Dec 1)
  - Cookies notice (Dec 5)
  - Favicon renders properly (Dec 7)
  - Web copy reviewed (Dec 9)
- Done**
  - Font and image licensing (Nov 30)
  - Sharing icons updated and working (Monday)
  - Scripts and images are optimized (Nov 25)
  - Web copy drafted (Today)
  - Exclude IP addresses for tracking (Nov 18)

Annual conference plan

Timeline

April 26 27 28 29 30 May 1 2 3 4 5 6 7 8 9 10 11

Foundational

- Finalize event name (Due Today)
- Finalize event theme (Due Today)
- Finalize event budget (Due Tomorrow)
- Propose 3 conference keynote ideas (Due Today)
- Finalize event agenda (Due Monday)
- Recruit three speakers for conference

Travel + lodging

Vendors

Event content

- Reach out to potential guest speakers
- Map out potential breakout strategy top...
- Secure speaker panel

Logistics

Final prep

Branding

- Schedule event (Due Tomorrow)
- Explore event theme ideas
- Design event logo & branding

Design

Promotion

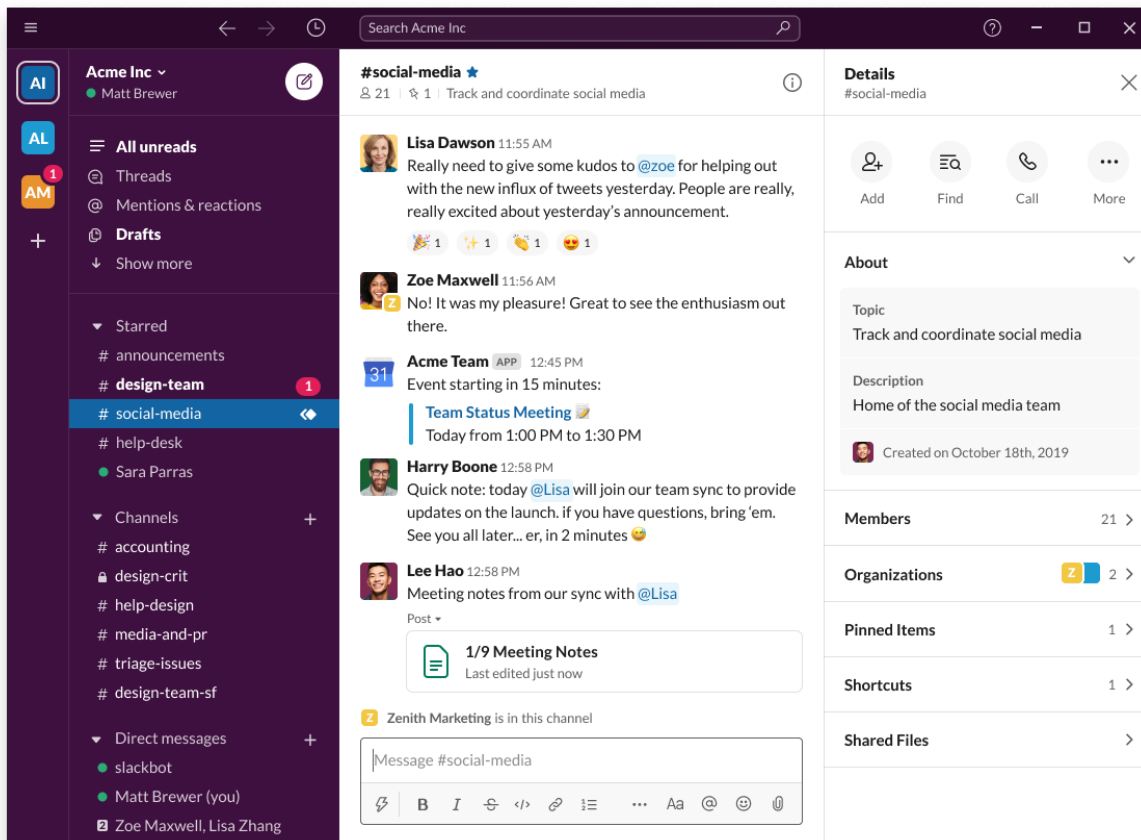
Send save the date

View unscheduled tasks



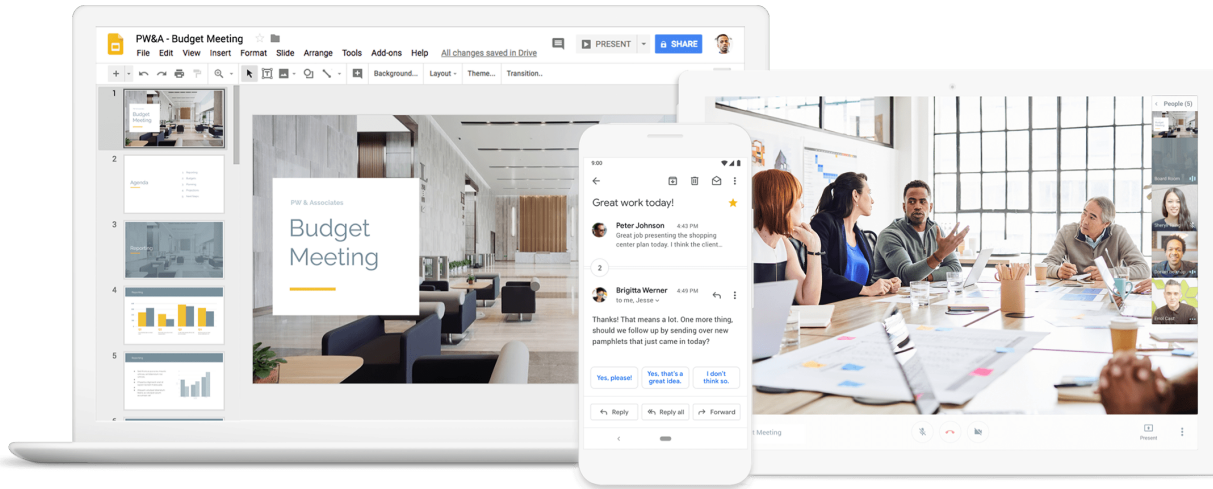


With all of your communication and tools in one place, remote teams will stay productive no matter where you're working from.

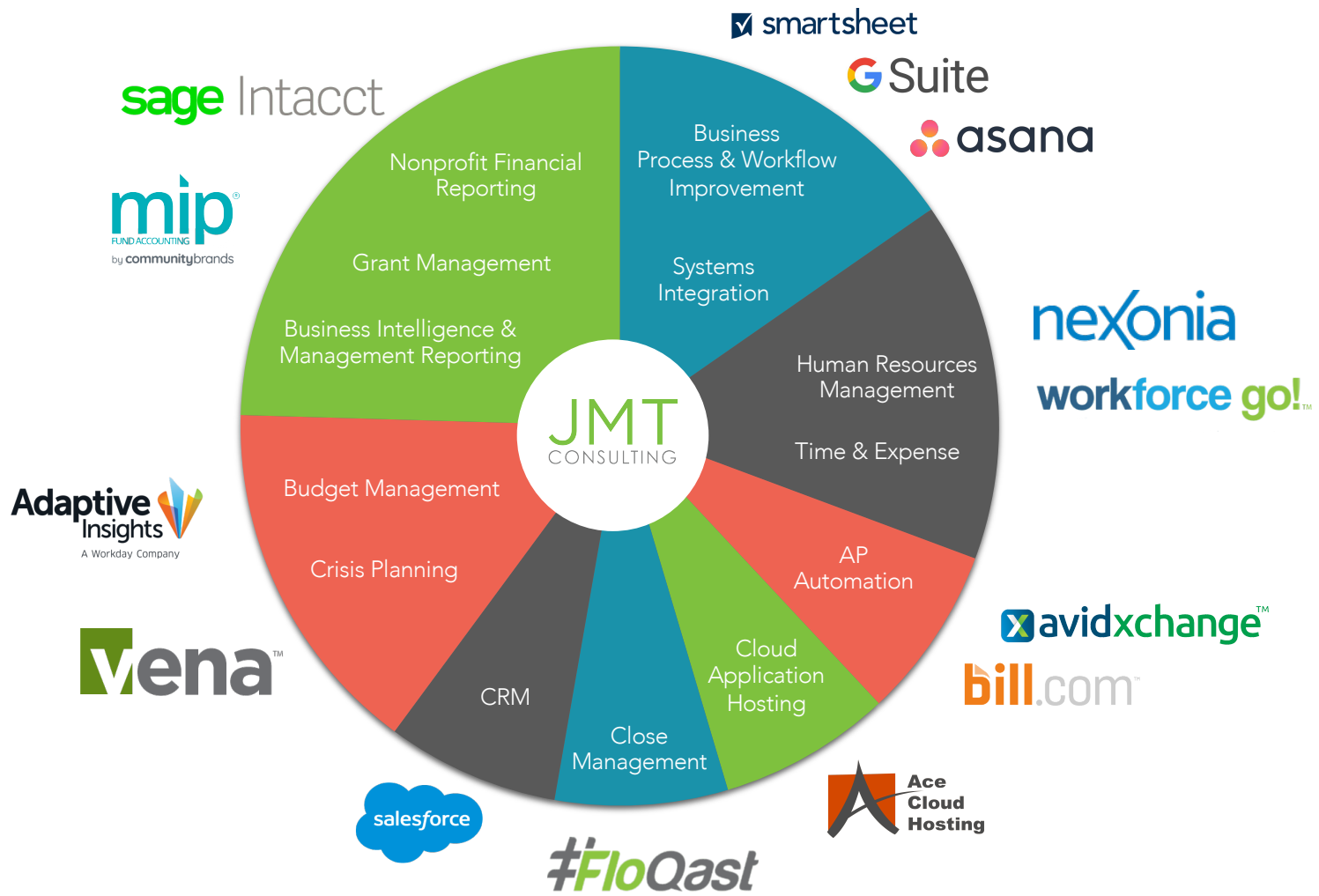


- Integrations with Hubspot, Salesforce, Google Suite, etc.
- Direct messages or 'channels' for group or project-related message threads





- Meet safely from anywhere with Google Meet
- Collaborate in real-time on documents, presentations, spreadsheets, etc.
- Built-in security features and Cloud backup



# JUMPSTART Implementation Service Options

## EXPRESS

LIVE IN 7 DAYS!

For the organization that needs a new solution FAST. Limited functionality is fine for now (with the option to add complexity later).

## PLUS

LIVE IN 45 DAYS!

Perfect for nonprofits looking for an immediate solution but have a little bit of flexibility in terms of timeline and initial requirements.

## CHOICE

4-MONTH IMPLEMENTATION

For the organization who has non-negotiable needs that can be addressed with limited customization.

## COMPREHENSIVE

6-MONTH IMPLEMENTATION

Build your "dream house" of accounting systems with end-to-end customization, 3rd-party integrations, onsite support, and much more.

# Implementation Highlights

- Flat rate fixed fee; no change orders
- Dedicated Project Manager
- SmartSheet project plan for full transparency into project status and progress
- Dedicated Project Designer
- Array of comprehensive training options (online or remote)
- Integration assistance



“  
Identifying the needs of a nonprofit  
and solely focusing on that is exactly  
what you would want in a consulting  
group.

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ANTHONY HERRERA  
Financial Systems Manager  
Educational Alliance



# Why Partnering with JMT is Smart

- ✓ Unparalleled industry knowledge and 30-year track record of working exclusively with nonprofit organizations
- ✓ 2,000 happy nonprofit clients
- ✓ Advocate for the long-term
- ✓ Rapid and affordable implementation



# Next Steps

- Participate in a **Discovery Session** with our nonprofit experts (1 to 3-hour time commitment)
- Solutions Consultant, Account Executive, and Sales Engineer will participate to learn more about your organization's pain points and organizational goals
- This session will result in a **Summary of Findings** – a document outlining what we discovered and what path forward we recommend



QUESTIONS?

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