

CUSTOMER STORY

One Person. 50 Budgets. How Vivie Transformed Financial Planning with Prophix One™

Key results snapshot

- ✓ **A lighter workload, even with 2x the volume:** Though budget volume doubled post-merger, it was still delivered within the same 5-month cycle – without adding headcount.
- ✓ **From 3 weeks to 1 minute:** Budget templates were built manually and took up to 3 weeks before. Now, they refresh with a single filter change.
- ✓ **From scattered effort to streamlined operations:** Processes that used to demand three people now run smoothly with oversight from just one. Prophix handles the heavy lifting.
- ✓ **Real-time data, no manual keying:** Point Click Care flows directly into Prophix One every night – closing the gap between budgeted assumptions and the system's truth.

Business challenges

Before Prophix, Vivie's finance team built and maintained budgets entirely in Excel. Pulling actuals into dozens of location-specific templates, verifying formula integrity, and managing version control consumed weeks of effort each cycle – time spent on data assembly rather than analysis. Adding a single new account or location meant manual row insertion and formula checks across every workbook.

Occupancy trends, census figures, care package rates – all data from Point Click Care – had to be extracted and keyed in manually, creating persistent gaps between budgeted assumptions and what the system actually reflected. Spreadsheet access constraints made it impossible to bring operational directors into the process, so plans were built in isolation, without input from the people closest to performance.

Who is Vivie?

Vivie is a Minnesota-based not-for-profit provider of senior living and in-home care services across Minnesota, North Dakota, and Wisconsin.

Formed through the merger of Knute Nelson and Walker Methodist, Vivie supports older adults across the full continuum of care – from independent and assisted living, memory care, and long-term care, to home health, hospice, rehabilitation, and population health services.

Applications deployed

 Prophix One FP&A Plus

System integrations

PointClickCare®

Sage Intacct

homecare
homebase
Empowering Exceptional Care®

"Now that we've integrated with PCC and we can see the true year-to-date actuals, we can challenge our operations on the targets they're giving us, and be more realistic when we're creating our budgets."

Kaylee Helberg, Senior Director of Finance
Vivie

Why Prophix®

Vivie knew they needed a true system of record – not another layer on top of spreadsheets. Prophix One's structured model architecture delivered exactly that, giving the team a purpose-built platform that eliminated the manual effort and error risk they had outgrown.

- **Purpose-built for budgeting:** Unlike other solutions evaluated, Prophix felt like a genuine step away from spreadsheets – a structured model built for budgeting, not a workaround on top of one.
- **Connected to existing systems from day one:** Sage Intacct, Point Click Care, and Home Care Home Base were all live at implementation – with a nightly PCC feed ensuring census, occupancy, and care package rates are always current, never manually entered.
- **Granular planning capability:** Shift-level nursing schedules with accurate differential costing, and branch-level revenue targets for home health and hospice, replaced top-level aggregates for the first time.

Business impact through Prophix One™

Since implementing Prophix One, Vivie's finance function has shifted from a reactive, manual operation to a proactive, data-driven planning engine – enabling the organization to scale without adding headcount or extending timelines.

- **Faster, more accurate budgets:** A process that once consumed weeks of manual effort now runs in a fraction of the time, with system-enforced calculations ensuring accuracy across every location.
- **Finance as a strategic partner:** With live PCC data at their fingertips, the finance team can now challenge operational assumptions with evidence – shifting their role from data assemblers to decision-makers.
- **A platform that grows with the organization:** Through a major merger and a doubling of portfolio size, Prophix absorbed the change – proving it can scale alongside Vivie's long-term growth without disruption.