FloQast ReMind Smoothes Kinks, Brings Transparency to PulteGroup's Multi-Division Accounting Process

Between school, audit, and industry work, accountants spend thousands of hours learning their trade. Given the collective experience and expertise present on an accounting team, such trivial — yet important! — tasks like sending follow-up emails and requests to a variety of departments each month are both time-consuming and fraught with room for error.

As a company built by accountants, FloQast is well aware of this situation and sought to create a solution. FloQast ReMind is a Request Management Workflow addition to FloQast Close, enabling teams to accelerate the close without adding additional stress or compromising accuracy. For PulteGroup, one of the largest homebuilding companies in the world, FloQast ReMind offered a way to scale back the amount of administrative information-collecting tasks while adding consistency and accuracy.

> **"ReMind allows our business partners to view what we're doing as more progressive. By leveraging the technology itself, they know, 'I get it every Friday, I respond, and no one else is emailing me.' For our team, it gets them excited about the possibilities. It creates a progressive mindset for our team."**
>
> **Geena Lewis,** Manager — NSS Accounting Services Group

Ultimately, this allowed the company's accountants to spend less time crafting and sending requests for information (and their follow-ups) and more time proactively approaching regular accounting operations.

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Industry
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Objective
To improve accounting operations — specifically the month-end close — by automating the requests and information gathering.

Why FloQast
- Wanted an easy-to-implement system to improve the timeliness and accuracy of the close
- Needed a better way to track statuses and eliminate roadblocks across 28 divisions and over 240 employees
- Sought to establish a consistent, time effective way for managers to collect information each month

Results
- Standardized and expedited the information collection process, freeing up team members to focus less on administrative tasks
- Improved communication across a large accounting team
- Ensured that relevant information was collected on a consistent basis without adding more work for managers

It Takes a Village

Headquartered in Atlanta, PulteGroup's accounting team of over 80 GL accountants works with 28 separate divisions and their finance teams on a monthly basis. To improve visibility into the month-end close, the company implemented FloQast's accounting workflow automation solution and saw results almost immediately.

> **"The information capture is what really made it a game-changer. You can schedule emails, but you're still opening up each draft, copying and pasting the request, and scheduling. That takes a ton of time with a company of our size. With ReMind, the mass collection of the responses is key. The templates allow you to capture whatever additional data you need. The fact that it puts all the data into one sheet saves so much time."**
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"Our implementation was very quick," said Geena Lewis, Manager — NSS Accounting Services Group. "Our Customer Success Manager was amazing, and we worked with the FloQast Support team to put together a very granular plan in terms of target dates and expectations. The overall transparency has been fantastic."

Per My Last Email ...

With so many divisions and the sheer number of stakeholders, instituting a consistent way for the accounting team to streamline the information request process was key. The only problem: There wasn't one. Like accounting teams everywhere, requesting information and the inevitable wave of follow-ups and reminders was a highly manual process.

"Every week, we have to submit this cash flow to our treasury team, which means we have to request [information] from our 28 different divisions several times a month. The divisions' responses were very sporadic and created a lot of extra work for everyone," said Geena. "Now, we can send requests through ReMind and we can gather all the information in aggregate. I can look and see if an individual has

responded, and I can see if we have responses from all 28 divisions. From a manager's perspective, it helps me to leverage that data so I can communicate to the powers that be: What do we need? When is it due? Why is it important? That has helped our division partners understand the importance of getting the information submitted on time. It's something about knowing that you're tracked that always gets a better response rate."

The Progressive Accounting Team

Further, Lewis said, ReMind offers greater transparency for all involved.

"ReMind allows our business partners to view what we're doing as more progressive. By leveraging the technology itself, they know, 'I get it every Friday, I respond, and no one else is emailing me.' For our team, it gets them excited about the possibilities. It creates a progressive mindset for our team. 'How else can we leverage a tool like this?' We leverage this technology to set it and forget it: 'I'll set it up now, I'll worry about it in 30 days.' But while I'm not thinking about it, it's doing the work for me. It's reminding people when they don't respond. If you want to be super aggressive it is going to remind you a thousand times that you haven't seen it."

Reflecting on ReMind's impact on the organization, Lewis was enthusiastic about the improvements the team has seen.

"The information capture is what really made it a game-changer," said Lewis. "You can schedule emails, but you're still opening up each draft, copying and pasting the request, and scheduling. That takes a ton of time

> **"We're always thinking about new ways to use ReMind. There are 28 different division partners you reach out to, and being able to leverage ReMind to eliminate all the back and forth is ideal. I can create a message and send it out en masse. We're really able to monitor what responses are at an aggregate level, and then eliminate a lot of the middlemen in conversations."**
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The Bottom Line

While Geena said her team has always been forward-thinking, she admitted that utilizing a solution like ReMind fundamentally changed the way team members approach both new challenges and old, imperfect workarounds.

"We're always thinking about new ways to use ReMind," she said. "There are 28 different division partners you

reach out to, and being able to leverage ReMind to eliminate all the back and forth is ideal. I can create a message and send it out en masse. We're really able to monitor what responses are at an aggregate level, and then eliminate a lot of the middlemen in conversations."

When asked if she would recommend ReMind to other accounting departments, Geena cut to the chase.

"I would definitely recommend ReMind," she said. "There's nothing worse than sending requests and knowing that the thing is still on your to-do list because you have to make sure you come back to it. The ability to set it and let the tool itself remind the people and gather those responses offers peace of mind, and who wouldn't want it?"

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