Confidence in every gift, clarity in every report

How Sage Intacct inspires trust and transparency for
First Baptist Church of Milford

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Barry Pettyjohn
Project Development Manager, First Baptist Church of Milford

The challenge
First Baptist Church of Milford's systems were overburdened and fragmented. With Sage 50 and a complex web of integrations, the finance team struggled to manage donation tracking, missionary distributions, and multi-entity reporting efficiently.

The solution
The church implemented Sage Intacct and adopted Sage Intacct Fundraising to replace Salesforce. Together, the two systems eliminated the need for costly middleware, reduced manual work, and provided timely, accurate data to support decision-making and donor relations.

Results with Sage Intacct and Sage Intacct Fundraising
By streamlining core processes and eliminating inefficiencies, First Baptist Church of Milford has gained time, saved money, and strengthened its ability to serve.

- Achieved 20% efficiency gain, driven by automation, improved accuracy, and streamlined workflows.
- Eliminated six hours of monthly report preparation time.
- Saving over $10,000 annually in integration costs.
- Gained real-time, detailed missionary reporting.
- Reclaimed at least 12 staff hours per month from reporting and donation processing.

Organization
First Baptist Church of Milford

Location
Ohio, US

Industry
Nonprofit

Sage Products
Sage Intacct
Sage Intacct Fundraising

FIRST BAPTIST CHURCH OF MILFORD

About First Baptist Church of Milford
Founded in 1958, First Baptist Church of Milford is a vibrant, multifaceted ministry located in Milford, Ohio. In addition to its local church congregation, the organization operates a K–12 Christian school, two colleges, a global missions program, and a large-scale Bible publishing ministry. Through its various entities and initiatives, the church supports hundreds of projects and missionary families around the world.

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A complex ministry with a clear financial mandate

First Baptist Church of Milford is many things—a place of worship, a center for education, a publisher, a global missions organization. With over 100 employees, 12 distinct entities, and hundreds of ongoing projects, the church operates with a level of complexity rarely seen in organizations its size. Each month, more than 2,000 checks are processed, supporting everything from Bible translation initiatives to missionary families around the world. Accuracy isn't optional—it's mission-critical.

For years, the finance team managed this intricate web of donations and distributions using a combination of Sage 50 and Salesforce. But the limitations were clear. Custom integrations between systems were costly and fragile. Basic reporting took hours of manual effort. And even small changes—like updating a screen layout—required expensive vendor intervention. "We were running at about 70 percent efficiency," says Barry Pettyjohn, Project Development Manager for the church. "Too much time was going to workarounds, not the work that really matters."

As the church grew, so did the administrative strain. While flexible in theory, Salesforce couldn't handle the complexity of missionary giving, where a single donation might need to be split across multiple bank accounts, dimensions, and tax designations. Just keeping the systems in sync was draining the budget.

"We were paying for hours of vendor time each time something broke—and something always broke," Barry recalls.

A new foundation for stewardship

When the church implemented Sage Intacct and adopted Sage Intacct Fundraising powered by DonorPerfect to replace Salesforce—it was more than a systems upgrade. It was a turning point. Since implementing the solution, the team has increased overall efficiency by an estimated 20 percent—freeing up time, reducing errors, and improving confidence in their processes.

Missionaries rely on timely, transparent reports to understand what support has come in and to prepare their thank-you communications. In the past, creating those reports meant manually adjusting more than 50 files each month, converting them into usable formats, and double-checking for data issues—an effort that often consumed six hours or more.

Now, the process is faster, cleaner, and far more reliable. The finance team can schedule and automatically distribute customized giving reports to missionaries and ministry leaders.

"We have confidence that our reports are accurate, which is vital for our missionaries who rely on these reports for their paychecks," notes Barry.

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With less time spent on manual tasks, the finance team can focus on supporting missionaries, funding projects, and advancing the church's global ministry.

More clarity, fewer clicks

Sage Intacct Fundraising has also simplified day-to-day operations. The team now benefits from improved search functionality, donor contact management, and the ability to store multiple addresses per record—a significant improvement for organizations like First Baptist, which receive support from numerous churches. Many of these supporting churches share similar names, such as "Calvary Baptist Church," making precise record-keeping essential. "You wouldn't believe how many Calvary Churches are out there," Barry remarks with a smile.

Staff have gained back hours of time once lost to corrections. In the old system, fixing a single entry error could involve updating five separate records across multiple applications. Today, the same fix takes just minutes. "It's a big deal when you're handling this many transactions," Barry says. "We're still human—we make mistakes. But now we can correct them quickly and move on."

It's also easier to track complex gifts. Missionaries often raise funds for multiple purposes—some taxable, some not, and some held in escrow. With Sage Intacct Fundraising, each gift can be tagged accurately, routed appropriately, and reflected in the correct reports. "We used to spend so much time making the system work," Barry says. "Now the system works for us."

Real-time insights, stronger relationships

One of the most important benefits of the move is what it's done for communication and transparency. Missionaries and ministry leaders now receive consistent, clear reporting that reflects not just the total amount received but where it came from and how it's allocated.

These reports aren't just for compliance—they're essential tools for ministry. Many missionaries send quarterly updates to supporters, often including personalized thank-you notes tied to specific gifts. With the new reports, they know who gave, when, and to which purpose—whether personal support, translation work, or children's homes. That visibility strengthens relationships and helps ensure donors feel seen, appreciated, and connected to the impact of their gifts.

It's also made a difference internally. Leadership now has better visibility across the organization. Because the system ties donations and expenses back to specific projects and entities, decision-makers can spot trends, evaluate performance, and allocate resources more strategically.

"We've never had this level of clarity," Barry says. "We can see giving across all 12 entities, compare performance by fund, and plan with much more confidence. Before, we were constantly double-checking everything, afraid of what might slip through. Now we can trust the data and spend more time on ministry."

The transition has brought financial benefits, too. By eliminating one of its largest Salesforce integration points and retiring overlapping systems, the church expects to save more than $10,000 annually—while gaining back at least 12 staff hours a month in reporting and donation entry alone.

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> "It's transformed how we work, helping us to streamline our operations, connect our data, and free up more time to focus on delivering meaningful impact."

Barry Pettyjohn
Project Development Manager, First Baptist Church of Milford

Designed for real-world ministries

Perhaps most meaningfully, the platform is accessible. Staff who once felt overwhelmed by Salesforce now find Sage Intacct Fundraising more intuitive and easier to navigate. It supports how ministry works—accounting for real-world complexities without creating more of them.

The next step? Outreach. With accurate giving data at their fingertips, the church is preparing to launch more personalized donor communications. "We want to send the right messages, to the right people, at the right time—based on real engagement and what matters to each donor."

Barry estimates the finance team is now operating at over 90 percent efficiency. Monthly workflows are lighter. Staff aren't stuck cleaning up data late into the evening. And while there are still new features to learn, the overall experience has been transformative. "Since adopting the solution, we have full confidence in the accuracy of our data, which has strengthened transparency with donors and deepened their trust," he concludes. "It's transformed how we work, helping us to streamline our operations, connect our data, and free up more time to focus on delivering meaningful impact."

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