

Case Study

Financial Information on tap at Leonard Cheshire

Client: Leonard Cheshire

Sector: Charity

Project: OpenAccounts

Leonard Cheshire's new centralised accounting function is using OpenAccounts to provide rapid access to financial information and reporting across the entire organisation. Advanced Business Solutions are also playing a central role in helping Leonard Cheshire to streamline and consolidate its financial processes.

Leonard Cheshire is the UK's leading provider of disability support services, and campaigns on the rights of disabled people. Globally the charity continues to pioneer new projects and services. The charity now directly supports more than 21,000 disabled people in the UK, and is active in more than 50 other countries around the world. It has an annual income of £135 million and employs 6,500 staff.

As a registered charity, Leonard Cheshire has obligations to donors and the Charity Commission alike. It must, for example, act in a transparent manner and utilise its annual income as effectively as possible. This demands an up-to-date financial accounting system that supports high levels of visibility and control.

Granville Miller commented:

We wanted an up-to-date system that was robust and scalable enough to support the entire charity from one central location.

Historically, the different services provided under the Leonard Cheshire umbrella exercised a high degree of autonomy, with the result that accounting practices and processes varied greatly from one part of the organisation to another.

Recognising that this approach was inadequate, Leonard Cheshire implemented a standardised accounting system in 1994. However, although this ironed out many of the inconsistencies, it was eventually recognised that further gains in efficiency could be made.

"We had a situation where everyone was doing more or less the same thing, but they were doing it at 11 different sites" commented Granville Miller, head of accounting development and policy. "We therefore decided to consolidate all our financial functions at a single accounting centre."

By this time, Leonard Cheshire's financial system was becoming severely outdated. Although its inadequacies had not yet begun to affect the organisation's operations, Miller and his colleagues could see that they would soon start to run into problems in areas such as reporting.

"We wanted an up-to-date system that was robust and scalable enough to support the entire charity from one central location." explained Miller. "It had to be user-friendly, with good reporting functionality, and we wanted to be able to introduce it without causing significant disruption to the charity," explained Miller.

Focused implementation

From an initial list of 37 financial systems, Leonard Cheshire chose 12 for more detailed evaluation. Six vendors were invited to present their systems, and at the end of this process Leonard Cheshire opted for OpenAccounts from Advanced Business Solutions.

"As well as offering us a product that fulfilled the requirements we had worked out in advance, Advanced Business Solutions impressed us because it made an effort to present its financial system in a way that reflected the way we worked. Here was a vendor that had clearly gone to a lot of trouble to understand our business, and could demonstrate that its software would look and feel right for us without a lot of extra work." said Miller.

According to Miller, none of the other suppliers involved were able to show their products in context. OpenAccounts also stood out because of its exceptional user-friendliness. The regionalised nature of Leonard Cheshire's business dictated a phased rollout of the OpenAccounts system.

The first regional site, representing some 10 per cent of the UK organisation, was converted to OpenAccounts and the remaining nine regions added gradually over a period of two years with minimal disruption to day-to-day financial processes. Only the initial installation involved conversion, with the other regions depending on the importation of routines – a process that Miller claims OpenAccounts is very good at.

Leonard Cheshire assumed responsibility for building an interface with its external fee-billing system. The flexibility of the OpenAccounts system to import files in a variety of formats was greatly appreciated during this process.

"Advanced Business Solutions had a very clear, focused way of tackling the implementation. In combination with a similar approach by the Leonard Cheshire team, this ensured a successful outcome in line with the project timetable." commented Miller.

Today, OpenAccounts supports all 150 or so Leonard Cheshire locations in the UK, including its residential homes and day centres. It is used to carry out all the organisation's core accounting processes and associated reporting.

Improved control

According to Miller, the most obvious benefit of the Advanced Business Solutions system is the fact that financial information is now much more readily available. *"With our old system, if we wanted to run an organisation-wide report we had to first of all collect reports from ten different regions, and we couldn't even do that until the end of an accounting period. Now we can get important information at any time without having to plan for it in advance."* he said.

Case Study

Granville Miller commented:

Everyone I know has adapted quickly and easily to OpenAccounts. Most impressive of all is the fact that when we bring in temporary staff, the amount of training required is minimal.

It is also possible to create centralised reports in areas such as purchasing, and errors can now be tracked remotely. "We couldn't dream of doing this in the past." said Miller.

The implementation has enabled Leonard Cheshire to identify the shortcomings of its old financial processes. Although every site had been using the same accounting system, it quickly became clear that the organisation's accounting processes were very fragmented. Now that the errors have been identified and corrected, Miller claims that overall financial control has improved greatly, as has administrative efficiency.

As far as end-users are concerned, the new system has certainly delivered on its potential, *as Miller explained "Everyone I know has adapted quickly and easily to OpenAccounts. Most impressive of all is the fact that when we bring in temporary staff, the amount of training required is minimal."*

Leonard Cheshire is well aware that many more benefits are potentially available. For the moment, it has only implemented core ledgers and credit control, but it plans to expand the scope of the system to cover fee billing, document imaging, and perhaps budgeting. Project accounting has already been installed, although it has not yet gone live. In addition, the limited amount of web-based access currently available on the reporting side will be extended.

"Thanks to Advanced Business Solutions, we've now got financial information on tap, with cross-organisational reports available at the click of a button. OpenAccounts has also played an important role in helping us to streamline our financial processes, and I expect this to continue in the future." concluded Miller.

About Business Solutions

Advanced Business Solutions, an Advanced Computer Software plc company, provides leading integrated business applications and services that enable public, private and third sector organisations to retain control, improve visibility and gain efficiencies whilst continually improving corporate performance. It's award-winning software systems comprise core financial management, procurement, human resource and payroll systems, integrated with a range of collaborative, document management and business intelligence solutions. It also provides managed and bureau service options.

Advanced Computer Software plc is the UK's leading supplier of software and IT services to the health, care and commercial sectors. It comprises 3 main divisions and has 7000 customers and 800 staff worldwide.

For more information

Advanced Business Solutions is a brand name of COA Solutions Ltd. registered in England, company number 03214465.

Registered office: Munro House | Portsmouth Road | Cobham | Surrey | KT11 1TF.

t: +44 (0) 08451 606 162 f: +44 (0) 1932 584 001 e: marketing@advancedcomputersoftware.com www.advancedcomputersoftware.com/abs

COA Solutions Ltd. recognises the trademarks of other companies and their respective products in this document.