

Key Features

- Proactis Spend Control
- SunSystems Financials
- SunSystems Vision



CfBT Education Trust

CfBT Education Trust is a leading education consultancy and service organisation. Established 40 years ago, CfBT Education Trust now has an annual turnover exceeding £100 million and employs more than 2,500 staff worldwide who support educational reform, teach, advise, research and train.

CfBT is ranked as one of the UK's top 50 charities.

Critical Issues in Purchasing

CfBT is a large organisation that is geographically dispersed. Being such a diverse organisation meant that it was experiencing difficulties in ensuring good purchasing practice across the board. It was recognised that this needed to change in order to help realise cost reductions and meet efficiency targets.

The organisation had been using a number of different methods for requisitioning, authorisation, goods receipting and invoicing. These methods were managed using a variety of systems, including paper-based, excel spreadsheets, and bespoke systems.

This had many impacts:

- Duplication of effort
- Incomplete information on commitments
- Increased risk of non receipt or poor quality of goods
- Economic loss through not ensuring value for money
- A lack of reporting and trend analysis
- Delays in payments to supplier
- Lack of management control

Furthermore, this had a knock on impact of limiting the ability for effective strategic planning.

Emma Friend, Group Management Accountant, explains:

"CfBT Education Trust has experienced significant growth over the last 10 years and now has a number of sites based across the UK. The volume of invoices has consequently increased and there were a number of disparate processes for raising POs and processing invoices. This resulted in duplication of effort and inconsistencies in commitment accounting."

Key requirements

CfBT has successfully been using SunSystems as the basis of its financial management system for a number of years. It was critical to the organisation that whichever system it chose, would be the best system to integrate seamlessly with SunSystems.

A number of key requirements were identified:

- A single e-procurement system across the organisation to provide functionality for the processing and tracking of the full procurement lifecycle
- To introduce rigour in the purchasing process
- To enable the transfer to SunSystems Financials and reporting of commitments, accruals and actuals
- To reduce delays to processing and settlement of invoices
- To implement a system that is proven and reliably integrated with SunSystems
- To improve financial management information with “dashboard functionality”
- To implement a system that supports effective and efficient supplier management
- To provide quicker and clearer reporting to budget holders

Proactis – the ideal solution to work alongside SunSystems

The selection process involved the formal issue of an invitation to potential suppliers to tender for the supply of a new purchasing system. As a result of that process, Proactis from Lake Financial Systems was selected. There were a number of reasons for this choice:

- Proven integration with SunSystems
- Powerful reporting and “dashboard functionality”
- Met all the requirements detailed in the Invitation to Tender
- Provided commitment accounting at all 3 levels (unauthorised spend, authorised spend, and accrual spend)
- LAKE has proven experience of planning and implementing Proactis across organisations of a similar size and type
- Additional modules including Vision for Proactis that are of interest for future roll-out

Emma Friend explains:

“Proactis was the ideal solution due to its interface with SunSystems. From the outset, it appeared user friendly and incorporated all of the required functionality, such as the automatic generation of commitments, and self-service reporting and dashboard functionality”

“LAKE’s demonstrable experience as an implementation partner was key in our decision as to which supplier to go with.”

Implementing Spend Control

Workshops

LAKE employs a structured approach to system implementation. This method reduces project risk and increases the transparency of the process for management. The planning, design and build phases of the project involved a series of intensive workshops.

"The workshop approach worked really well. The LAKE consultant was very knowledgeable and by drawing on past experience challenged our assumptions about the best way to design the system."

Training

LAKE's collaborative approach to systems implementation was exemplified on this project. A major part of CfBT's work is as a provider of training so, as one might expect, they took a particularly active role in delivering end-user training.

"LAKE provide training to key users as the build of the system progresses - it is important to document this as you progress. CfBT appointed a dedicated trainer so we could be sure to reach our 300 users. Training materials were written and a full day allocated to PO raiser training. Follow up support was then provided by our trainer..."

..Now that we are half way through the training, we have tailored the sessions to respond to user feedback and make the user take-up even more successful."

Document Imaging

During the implementation the project team extended scope to include document imaging. Remarkably, this change was incorporated into the project plan without delaying the go-live.

"This was a change to the scope of the project and was decided upon after we had consulted with our users. There was a concern about users not seeing invoices and when we looked into this further it became clear that users would benefit from being able to view the invoices in order to check details and deal with discrepancies. This is working very well and is significantly reducing the amount of paper flow around the organisation."

User buy-in to the process

The implementation of Spend Control is a significant change in working practice for hundreds of people, and as such, it requires careful management to ensure that colleagues buy in to the new process and ensure its success.

"The project marked a significant change to the way in which CFBT works and so naturally there were some concerns and lots of questions from users on how it would affect them. We found it is important to get people involved as soon as possible and communicate progress to people frequently. It is also important to spend sufficient time on the process design so that your process is as simple and straightforward as possible..."

..We are now two months through our rollout and have nearly 150 users trained and well over 2,000 purchase orders on the system!"

Contact

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