

L A K E

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"I saw in LAKE a partner who could really make a difference in the change management process"

International Charity

Situation

[Company background removed]

Critical Issue

The [Organisation Name] had been using a bespoke finance system based on a package called Unique, for 15 years or more. However, the organisation had changed so much over the years that it had become increasingly difficult and risky to customise the system further to accommodate the changing needs of the organisation. And, as often happens with systems of this kind, gaps in functionality were being plugged by lots of people working on lots of Excel worksheets, which compounded inherent inefficiencies in the finance system.

Mounting concerns over the old system led to a decision to replace it with a more robust and scalable financial management and reporting solution better suited to the growing needs of the [Organisation Name].

LAKE SunSystems Solution

In looking to replace Unique it was clear from the start that the new system would need to offer a depth of functionality not found in most systems. The following provides a flavour of the [Organisation Name] requirements:

- Up-to-date management reporting directly from data held in the system
- Consolidated reporting across all operations
- Financial Reporting to meet SORP and statutory requirements
- Excellent integration with other systems
- Flexible analysis structures to facilitate reporting across complex segments and divisions and dimensions
- Accounting for VAT with the flexibility to cope with Partial Exemption

[Name], comments

"We were looking for a mid-range system as our needs were reasonably sophisticated. We did not want one of the largest systems, however, as this would have been a "sledgehammer to crack a nut".

A particular area of concern was that of budgeting and forecasting. The [Organisation Name] operates on a six year strategic planning horizon, within which they operate three budgets of two years each. In addition to reporting actual versus budget over these extended timescales, they need to be able to vary budgets and maintain an audit trail of these changes.

SunSystems from LAKE is a portfolio of integrated Financial Management and Performance Management applications that are ideally suited to the needs of not-for-profit organisations. The [Organisation Name] selected SunSystems from a shortlist that included Microsoft Dynamics and Exchequer Enterprise. One of the main reasons for the [Organisation Name] choice was that SunSystems was the product with the required depth of functionality to meet all their needs.

[Name], explains

L A K E

“SunSystems was chosen as it was clearly better at handling our budgeting requirements. It also has stronger reporting functionality, and is used by an impressive list of organisations whose requirements are similar to our own.”

LAKE - the right solution partner for Not for Profit

As part of the process of selecting a new finance system, shortlisted suppliers were invited to London to deliver presentations to the Finance team. These presentations were the opportunity for [Name] and the team to look beyond the technical capabilities of each system and get to know the suppliers. After all, selecting a new system is as much about choosing the most appropriate partner as it is about selecting a new system. As a result of that process LAKE were selected as the preferred supplier.

[Name], explains

“I personally favoured the LAKE presentation because, firstly, they were able to answer all our questions there and then and, secondly, LAKE answered our questions in a considered and balanced way. They weren't simply trying to sell something. It was a partnership attitude.”

In planning to change financial systems, the [Organisation Name] foresaw that the process of change might prove difficult in some respects. It was important to consider the needs of the users, in particular, those that had been using the old system for 15 years or more.

[Name] comments

“During their final presentation we were provided the opportunity to meet the LAKE consultant who would manage the project. This was particularly valuable, as I saw in LAKE a partner who could really make a difference in the change management process”

Positive Outcomes and the future - Spend Control

The initial project, involving accounting and reporting, recently went live. Following on from the success of that project, the [Organisation Name] is now embarking on a phase two project, part of which will address familiar Spend Control concerns.

[Name] explains

“This has been a very successful move for us. Having just gone live with SunSystems we have been able to extract our first budgets. This is something we were never able to do with the previous system. Everyone is pleased with it.”

“Phase two will address a key concern we have, that the Finance department receives a lot of invoices for purchases that are not properly authorised...”

...We will be implementing Proactis across the [Organisation Name] Intranet, thus making it available to our 13 offices worldwide.”

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