

Case study

Age
Scotland

Age Scotland is the Scottish charity for older people. It works to improve the lives of people over 50 and promote their rights and interests. It helps older people to be as well as they can be, promotes positive views of ageing and later life and tackles loneliness and isolation.

The challenge

Improve reporting and the flow of data to other departments

“There was a disconnect between the finance system and the rest of the organisation and that’s something I wanted to fix,” recalls Ben Thomas, who led Age Scotland’s move to iplicit as Interim Director of Finance.

The finance team’s day-to-day work includes distributing grants and handling large amounts in donations and legacies, supporting budget holders, authorising and paying invoices, as well as monthly and annual reporting for around 30 cost centres and departments.

“With the old system and processes, there was an awful lot of time wasted in ad hoc communications and it ended up with managers feeling they needed to keep their own spreadsheets. And then of course, a lot of energy was spent trying to reconcile the two,” says Ben.

“There was a cumbersome and inflexible coding structure and the reporting wasn’t as user-friendly and timely. It wasn’t reliable for remote working, as access was only via clunky central servers. And the audit trails and internal controls were not as good as we needed.”

Previous system: Sage 200

The solution

System has saved time and improved data

Ben hadn’t heard of iplicit before he first looked at it – but he quickly found it was suited to the challenges facing the charity. “Systems such as Xero and QuickBooks are excellent for organisations up to a certain size but would probably struggle with the number of departments and users we were looking at,” he says. “But I didn’t want to go down the Oracle or Microsoft route – where you need to spend your time building a system from scratch and spending a fortune on consultants and implementation experts.”

The fact that iplicit was a product created for the cloud was important. “I was keen to have something that had been built that way from scratch, rather than an existing system that had been polished up a bit,” says Ben. “The other reason we went for iplicit was that it seemed to be the right scale for the charity.”

He adds: “The experience has been very positive. The iplicit staff I’ve dealt with are knowledgeable, keen and they understand who we are and the system does exactly what we wanted.”

Age Scotland saw benefits:

- 1 Clear and simple approval workflows.**

“The workflows for authorising costs were a hugely positive change,” says Ben. “In the past, invoices would be manually emailed to budget holders, asking them to sign off and confirm the code they would like the costs to be posted to. You’d get email threads with lots of back and forth and approval bottlenecks, caused by varying response times. Now, if an invoice comes in, it’s automatically emailed by the system to the relevant budget holder, who can sign it off in iplicit.”
- 2 Live data that’s easily visible.**

“Perhaps the biggest advantage is the live visibility on data,” says Ben. “We still have Excel-based monthly management accounts that can be turned into PDFs and distributed to everybody, but everyone from budget holder upwards has access to their department’s data on iplicit. They can see their monthly and year-to-date budget variances, full-year budget and what they have remaining. They can drill down to see individual transactions and go even further to see invoices, associated emails and back-up documentation. This has been a huge change and means there are around 40 people throughout the organisation getting value from iplicit, rather than the four or five that used the previous finance system.”
- 3 Easier expenses.**

Expenses are significantly easier, with staff able to submit receipts as photos on their phones using the iplicit app, along with automated authorisation processes. “This generates a lot of goodwill towards the new system because people see it really helping them,” says Ben.

- 4 Automated partial VAT.**

iplicit makes quick work of partial VAT calculations. “On a typical cost, we can only claim about 3% of VAT back,” says Ben. “Since going live with iplicit, we can factor in irrecoverable VAT from the outset, rather than everyone being caught out by it being added to their costs six months in arrears. The bank links are now completely up to date, so the bank account is reconciled within a few hours, rather than through cash postings at the end of the month.”
- 5 Fast bank reconciliation.**

“A big portion of the time-savings has been due to bank reconciliations,” says Ben. “With the old system, all the figures had to be put onto a spreadsheet and there was a lot of coding to be done before it could all be posted into Sage after the end of the month. You could be ten days into the following month before you’d even got the bank figures posted, with all the attendant issues of transposition errors and so on.”
- 6 Rapid ROI.**

“iplicit justified itself within the first couple of months by saving time for both being able to access information and by reducing direct queries from the wider team,” says Ben. “We can now issue the management accounts in a third of the time.”

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The outcome

Time savings allow people to focus on making an impact

“Virtually everyone who works in the charity sector knows that funds are limited and there are decisions to be made to make sure money is spent properly. Money and budgets are part of what we do, so the more visible this work can be – and the less time-consuming it can be – the better,” says Ben.

“You don’t want somebody who’s meant to be making an impact spending a day every week trying to find out where they are financially – or stressing out because they don’t

know what they’re spending or getting surprises from the financial reports. Whatever their interactions with finance and budgets, it needs to be as streamlined as possible.”

By saving time and improving efficiency, the system has contributed to the charity’s core mission of working towards a Scotland which is the best place in the world to grow older.

