

## Case study

# Black Country Living Museum



Black Country Museum is a 26-acre open air living museum, which is a mix of reconstructed or translocated shops, houses and industrial areas that represent the Black Country. It's been used as a location for television and film productions such as Peaky Blinders and Stan & Ollie.

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## The challenge

### Automate manual processes and free up time

The finances of Black Country Living Museum can be complex. A small team handles sales and purchase invoices, bank reconciliation, journals and month-end management accounts. There's also the complication of partial VAT, with a registered charity and a limited company to account for.

“We had Pegasus Opera, an old system that relied on us processing everything manually,” says Diane Harvey, Head of Finance. “It had been updated over the years but it was still far behind what current systems were able to do.”

Sam Davies, Systems and Processes Business Partner, adds: “We're growing as a museum and the system wasn't fit for purpose. We wanted a system that would automate some of the more manual processes and free up some of our team's time to add more value.”

**Previous system:** Pegasus Opera

## The solution

### Team has saved time by reducing manual work and simplifying processes

The team sent tender documents to six software vendors. It was especially important to see how systems handled purchase ordering and partial VAT. “We needed more than Xero but we didn't need something like SAP,” says Sam.

The team met several vendors and narrowed the shortlist to two – iplicit and XLedger. “We judged it on the facts – what it could do, how much it was going to cost us and how it felt to use,” says Diane. “We got the finance team involved because they would be the main users of the system. It was a very structured process that came out with the right result.”



## The museum saw immediate benefits:

### 1 Simplified approval workflows

"I think the biggest functionality change is the approval workflow process at the point of order. In the old system, it was the invoices that were approved," says Diane. "Now, it's the order that's approved and it's sent to the finance team to process and make sure we pay the invoices. People have adapted and that's created efficiencies for them and us. The process can run seamlessly from the initial order to the payment of the invoice."

### 3 Easier audit

Auditors were given read-only access to the information they needed in iplicit. "They hadn't seen iplicit before but they picked it up quickly and they have all the information they need," says Diane.

### 4 Quick bank reconciliation

iplicit's automated bank reconciliation has been a "big win", says Sam. "Now the whole team can see on a day to day basis what's in the bank and work with that."

### 2 Less data entry

"The importing of journals is a massive efficiency boost, particularly when the task is so repetitive each month," says Sam. "Previously, I had to manually type in journals, some of which were quite long and complex." The ability to copy past invoices, orders or journals saves further time. "All you need to do is change the invoice number, date and ID and you're there, without having to type everything in again. You can do it in seconds," says Diane.

### 5 Responsive support

Support from iplicit is "great", says Sam. "They're very responsive and quick to come back. I'm loving the monthly webinars. They're very well thought out and presented and they let you know what's coming in the next release."

## The outcome

### Growth handled without increasing headcount

**Finance and non-finance users alike have found the system user-friendly and intuitive. "I tell my non-finance users during the training that with the access I've given them, they can't break the system," says Sam.**

Diane adds: "A lot of us had used the old system for such a long time that you get blind to the possibilities of a new one. But there are newer people on the team who've worked in lots of other places and used many different systems and the general consensus is it's a good system and easy to use."

The museum has seen a **"massive efficiency boost"** from the move to iplicit, she says. "We're growing as a museum but we haven't changed our team structure. If we'd kept with our old system, we might have had to expand the team, because we're a bigger organisation now, there are more transactions and there is more business going on in our trading units," she adds. "But we're able to keep going with the same team and when one of our team retires, we might not have to replace them because **we can do things more quickly and efficiently with iplicit.**"

