

## Case study

# Beaulieu Enterprises



Beaulieu Enterprises operates the Beaulieu attraction, which is home to the National Motor Museum, as well as Palace House and Beaulieu Abbey. It is also responsible for the maritime village of Buckler's Hard, Buckler's Hard Yacht Harbour on the Beaulieu River, as well as the surrounding estate.

## The challenge

### Free the team from laborious manual work and integrate systems

The finance team at Beaulieu Enterprises used to spend a great deal of time on laborious manual work. Many of the organisation's accounting processes were workarounds dictated by software systems that weren't integrated with one other.

With the finance software nearing the end of its life, the team wanted to see some big efficiency gains from a move to a new system.

The team manages the finances of five connected legal entities, including Beaulieu Enterprises itself which includes the Beaulieu attraction, known most famously for the National Motor Museum as well as Buckler's Hard and Buckler's Hard Yacht Harbour on the Beaulieu River. Day-to-day work mainly consists of cash in and cash out, as income is processed and suppliers are paid. The cash coming in can range from the price of a toy car in the gift shop to marina mooring fees in excess of £10,000.

**Sector:** Hospitality

**Previous system:** Sage 1000

## The solution

### Days saved thanks to automation and clearer processes

Beaulieu Enterprises went out to tender to find its new finance system and considered several options. "In the end, choosing iplicit was a no-brainer," says Justin Loader, ICT Projects Coordinator.

"iplicit came down to give us a demonstration and we also had a call with the team. The thing that struck us was that there was no stumbling over any of the answers to our questions – and the answer to anything we asked was 'Yes, it can do that'. On top of that, we felt the user interface looked much better than what we had."

The team visited another iplicit customer near its Hampshire base, "just to give us the final assurances that we were making the right decision", says Justin. "But there was no one banging the drum for any other system once we'd seen iplicit," he says.



Dean Daniels, Financial Director, says: "In the end, iplicit was cheaper as well, so it was win-win and a simple choice."

"The whole implementation process was good," says Justin. "We warned iplicit that our timescale for bringing it in was quite aggressive. We had a window from July until October, when we wanted to go live. iplicit assured us that while this was tight, it was achievable."

"We had weekly meetings and training sessions. Our project manager at iplicit and the engineers there really kept things on track. We went live as planned and at the end of the year, we turned off our old accounts server, just as we wanted."

Dean adds: "We knew there would be a steep learning curve because we wanted to go live so quickly. But the people we worked with at iplicit made the journey much easier."

## The team quickly saw big time savings.

# 1

### VAT returns

The team has saved on VAT returns in particular. "It used to take the accounts manager a good week just to put those together for seven entities," says Dean. "It was done in spreadsheets, with a lot of manual work that made it more complicated than it needed to be."

"The most complex of the VAT returns could take three days individually. Now it's a few clicks. We can do the VAT returns for the entities that are on iplicit, along with some that aren't on iplicit, in less than the time it previously took to do that one return."

# 3

### Management accounts

And when it comes to producing management accounts, the process has been streamlined by iplicit's live integration with Excel.

# 4

### Clearer processes

Finance processes at Beaulieu are now clearer and more efficient. "Another benefit is that people can now cover their colleagues' work," says Dean. "Whether you work for the National Motor Museum or Beaulieu Enterprises, you can cover for anyone else."

# 2

### Approval workflows

The team has also seen big efficiency savings when it comes to approving invoices. "At any point, we can see where an invoice is in the process. We can see who hasn't yet approved something they should or whatever else is going on," says Dean.

## The outcome

### Organisation is ready for wider digital transformation

**The move to iplicit has become part of a wider digital transformation. The team has recently been selecting new ticketing and retail software, which it intends to integrate with the finance system.**

"We've gone from 15-year-old finance software that's installed on computers to a modern, web-based package and now we're doing the same with retail and ticketing. So we're bringing ourselves into a new era," says Justin.

On top of that, iplicit has given the team the reassurance of a secure and reliable system that doesn't rely on an on-site server. "iplicit doesn't go down," says Dean. "Being cloud-based, it runs perfectly well – whether I'm using it on-site or at home."

