

CUSTOMER SUCCESS STORY

Martin House saw 'game-changing' benefits with iplicit

iplicit



Sector
Non-profit



Previous Finance System
An on-premises finance system



Number of iplicit users
5



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Martin House saw 'game-changing' benefits after moving to iplicit's accounting software

iplicit has made a "game-changing" difference to the work of the finance team at Martin House.

The team was worried about its "backwards and clunky" on-premises software, which on one occasion prevented anyone working in the system for three days. Security was a concern and staff were bogged down in time-consuming manual work.

The search for a powerful cloud accounting system led Martin House to iplicit. The software has drastically simplified everyday work and provided the charity with accurate, real-time financial data.

"In our old system, every report had to be pulled out and put into Excel before we could do anything with it. With iplicit, we can run reports and see them on the screen immediately. It's a huge improvement."



"On the purchase ledger side, in the past, we needed purchase orders in triplicate paper, which was unmanageable. Now, we have an invoice authorisation module that sends daily emails to budget holders if there are invoices to approve. This keeps things on track and is great for the purchase ledger controller."

Lindsey Fellowes-Freeman
Director of Finance and
Corporate Governance



About Martin House

Martin House is a hospice charity covering West, East and North Yorkshire. It specialises in paediatric palliative care for children and young people up to the age of 25. Children with life-limiting conditions go to Martin House for respite stays, symptom control and end-of-life care. The charity also provides bereavement support, family support, sibling groups and grandparents' groups.

The charity's expenditure runs at just over £10m a year with annual income being slightly under this. It is currently running a capital appeal to raise £12m.

A finance team of five deals with transactions of around £1m a month. The team handles around 400 supplier invoices, runs payroll for 215 staff and manages income from donations recorded in the CRM system. The department also has to reconcile income from 15 shops which use a separate till system.

Reporting has to be broken down to the level of individual donors, as well as regional friends' associations, legacies and the statutory funding, which accounts for around 20% of income. There is also a lottery to account for as well as income from trusts and foundations.

"It's a real challenge, but it's important for us to see exactly where all the donations come from and a lot of that information is held in the CRM system," says Lindsey Fellowes-Freeman, Director of Finance and Corporate Governance.

'We didn't feel the system was secure'

Martin House was keen to move away from its on-premises finance system.

"The previous system seemed backwards and clunky. It was held on an on-premises server, which we didn't feel was a secure way of doing things," says Lindsey.

"We wanted a cloud-based solution. The previous system felt out of date; we couldn't do electronic digital purchase orders or digital invoice authorisation. Everything was done manually, and the integrations were clunky. It didn't feel like a secure platform, so we looked to de-risk by going with an online solution."

Martin House considered 5 software providers before creating a shortlist of three. It sent out questionnaires



covering IT, security and functionality.

"We had several demos from each provider. In the end, we collated our findings, compared them with the best and final financial offer, and rated all three shortlisted systems," says Lindsey.

"We included members of the IT team for a non-finance perspective, and it was a unanimous decision to select iplicit."

"We were really impressed with the demos and how well iplicit was willing and able to deliver on the migration, which was a concern for us."

"The system ticked all of our boxes. The general vibe we got from the people we met during the demos was that it was a really progressive organisation. Although it is relatively new compared with Sage and others, we had enough confidence that iplicit would deliver what we needed. It seemed like an organisation that is going places, which is very refreshing."



"The invoice approvals are brilliant and game-changing. That's a big improvement for us."

Lindsey Fellowes-Freeman
Director of Finance and
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Improvements with iplicit

The move to iplicit has provided peace of mind. "It's all cloud-based, so nothing will stop us from working for days on end, as happened with our previous system," says Lindsey.

"At one time, on the old system, we couldn't work for three days. It was terrible, disconcerting and unreliable and you don't really expect that in this day and age."

Reporting and purchase ledger are the two biggest improvements with iplicit, she says.

"In our old system, every report had to be pulled out and put into Excel before we could do anything with it. With iplicit, we can run reports and see them on the screen immediately. It's a huge improvement," she adds.

"With the previous system, if you wanted to run a P&L for a quarter in the middle of the year, you had to run it for the whole year-to-date and then manually deduct the other quarters. It was archaic.

"On the purchase ledger side, in the past, we needed purchase orders in triplicate paper, which was unmanageable. Now, we have an invoice authorisation module that sends daily emails to budget holders if there are invoices to approve. This keeps things on track and is great for the purchase ledger controller.

"We've had to move off-site for a year while our hospice is being refurbished, so having a system where we can remotely approve invoices and raise purchase orders is significant for us."

Asked for her favourite feature in iplicit, Lindsey has a couple of answers.

"The archive is really handy. We no longer have to log into a different system to see our previous information, as we used to," she says.

But the approval workflows are probably the most useful feature, she says. "Those invoice approvals are brilliant and game-changing. That's a big improvement for us," she adds.

Moving to iplicit

Implementation of iplicit ran so smoothly that Martin House ended up going live with the new system ahead of schedule. Lindsey is full of praise for Sean Kelly, Solution Designer at iplicit, and his colleagues.

"They held our hands throughout and we had a clearly defined structure for the training, handover, and migration, which was followed to a T," she says.

"The finance team and I were understandably nervous about how the handover and migration would go but it all ran smoothly. We actually moved over a month earlier than anticipated.

"It's a new system, so there were more questions and adjustments, but we're already seeing the benefits."



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iplicit

Advice on switching systems

What advice would Martin House have for other organisations looking to switch accounting software? “I’d advise others not to move systems at year-end,” says Lindsey.

“We initially thought we needed to move at year-end, but iplicit was the only organisation that said we didn’t have to. In fact, the iplicit team said it may be better if you don’t because year-end is busy enough as it is. That was refreshing. I’d say maybe a half-year point is better.

“My other advice would be to allow time, prioritise training and planning, and decide within the team who’s going to do what part of the migration.”

Three words to describe iplicit

What three words describe iplicit?

Lindsey chooses:

- Dynamic
- Progressive
- User-friendly.

‘We have more confidence in the system’

With iplicit developing all the time, Martin House expects to see even more benefits.

“We haven’t fully calculated the time savings yet because there’s more functionality we might want to add, but we have a great deal more confidence in the system now,” says Lindsey.

“The monthly webinars that iplicit runs for customers, to introduce them to new features and make sure we’re getting the best out of the system, are brilliant.

“The team absolutely really rate them. It’s useful for us to learn new things about the system – and it’s great that iplicit is investing in progress.”

Accounting software for charities and nonprofits

iplicit is empowering nonprofit organisations around the world to take control of their finance operations and focus on what really matters. iplicit can help you upgrade with a number of solutions to support with accounting software for charities.

True-cloud accounting software without the sky-high pricing. iplicit is the award-winning accounting solution that pays for itself.

With iplicit’s automation tools you can close month end fast and with unlimited reporting dimensions, get critical insights quickly.

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