

Customer Success Story

Sage for Education

CHATSWORTH
SCHOOLS
Enabling outstanding futures...



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Fred Knipe, Chief Financial Officer

Background

Founded in 2019, Chatsworth Schools is a group of UK independent educational institutions consisting of nine schools and five nurseries with approximately 1400 pupils and 350 members of staff.

The group has a proven track record of outstanding educational leadership with real integrity, a passion for excellence and a commitment to Continuing Professional Development (CPD) for all staff. They work hard to create amazing learning experiences for their students so that they can embrace their inner wisdom and strengths.

The Challenge

Ahead of contacting Solutions, Chatsworth Schools were using Sage 50 as their core financial system. Each school employs a bookkeeper who carries out basic sales, purchase and bank account transaction entries with three or four staff members who review the bookkeepers' entries and carry out any journal adjustments. As the group planned to expand further, a more robust and scalable platform with the flexibility to support their growth ambitions was essential.

Chatsworth Schools needed to centralise reporting and several of their accounting functions, which could not be supported with multiple operating entities (and the head office) all using local Sage 50 systems.

Furthermore, the organisation needed greater financial control than their current software could offer them, and it was also important for the group to have the ability to easily set up new users and access rights within the system.

With Sage 50, Chatsworth Schools would have duplicated the set up for each user in each school's system and this would often become a time-consuming, manual task. Finally, with staff in multiple locations and no on-premises servers of their own, the company required a cloud solution allowing them to avoid the costs that are associated with maintaining expensive hardware on-site.

Solutions Approach

Having successfully used Sage accounting products for a long time, The Chatsworth Schools Chief Financial Officer Fred Knipe, was keen to migrate to one of Sage's more scalable systems. Following extensive research into the available options, Fred reached out to award winning Sage implementation partner Solutions for Accounting. A consultation exercise was carried out with Solutions' Sean Graham who advised that Sage for Education appeared to match Chatsworth Schools' needs in terms of functionality, centralised management and scalability.

When discussing why he chose Solutions for Accounting, Fred Knipe said:

enquiries@solutionscloud.uk
www.solutionscloud.uk

Solutions
for Accounting and CRM

"We came to hear about Solutions for Accounting principally because of the work they've done in the education sector, in particular via the linkage with our management information system provider and the number of schools they work with who are using both Sage 200 and the same MIS as our own."

With Sage for Education's robust reporting tools, a range of templates come as standard which require no maintenance from the user. This can save the organisation time and improve efficiency by reducing their reliance on Excel and allowing them to generate tailored reports on actuals, budgets and commitments. Furthermore, with Sage for Education Chatsworth Schools would be able to quickly generate the reports required by local governors and school leaders as well as centralised reports needed by head office stakeholders.

With no month-end routine within Sage 50, the group wanted to reduce their dependency on using Excel spreadsheets to collate data relating to each of the individual entities. Sage for Education is period controlled allowing users to close off periods and run real-time month end reports with ease. In addition, Sage for Education would also allow Chatsworth Schools to easily consolidate accounts for separate entities, each with different nominal structures.

Additionally, the group had found that setting up users on Sage 50 had become a complex process and a huge drain on time. Sage for Education would help solve this issue as the software provides a central area for creating operators. Chatsworth Schools would be able to quickly create new users centrally and alter which companies they have access to and what tasks they have the right to perform.

Previously, Chatsworth Schools users had accessed Sage 50 through a remote desktop connection, and inconsistent network performance had hindered their ability to retrieve data when they weren't sat at their desks in school. As Sage for Education is fully cloud-hosted, staff would have access to the system at any time and from any location, enabling them to access data directly via any internet enabled device.

The Outcome

After a successful migration to Sage for Education, Chatsworth Schools have been able to embrace the extensive functions and aspects of a more efficient system. Since the implementation, the group have been able to generate reports quickly and easily for multiple entities without the need to consolidate their data from various spreadsheets.

When discussing how Sage for Education has benefited Chatsworth Schools and its processes, Fred Knipe, Chief Financial Officer said:

"The reporting functionality of Sage for Education is far stronger than that of Sage 50 and the ability to drill down into transaction data is far better. Our E-payment process has now been improved, the bank feed process for entering transactions is neater than it previously was and the ability to email statements and invoices in a more user-friendly format has been great."

Since implementation, access to the system has become much easier with users no longer needing to use a remote desktop connection. Having the software accessible through an app or browser on their desktop or laptop means that users who work with multiple entities have been able to effortlessly switch between them, saving time and increasing productivity.

Chatsworth Schools are confident that over time, the new solution will further reduce the time that they spend on certain areas such as credit control, consolidation and reporting. Thanks to Sage for Education, the process of sending out bank statements to fee payers has become far easier. The reporting functionality and multi-company consolidation has significantly reduced their reliance on Excel, providing real-time access to key management information. Furthermore, the capacity to input budget information on a monthly basis and produce reports that compare month and year-to-date performance to budgets has improved the way Chatsworth Schools manage their data.

Solutions Operations Director, Sean Graham, has said:

"Chatsworth Schools were a classic example of a company who had outgrown Sage 50. Sage for Education not only provided an increased level of functionality but allowed them to improve their reporting and consolidation processes."

As a collection of independent educational institutions, it was key for stakeholder reporting to be quickly accessible. There was also an important requirement for flexibility which Sage for Education was able to offer with cloud access through a browser that Sage 50 couldn't compete with."

If you are interested in Sage for Education and would like to speak to our experts, please call 0115 840 5075 or email enquiries@solutionscloud.uk.

Scan our QR Code to find out more about how Solutions for Accounting can help your school better manage your financial processes.



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Sean Graham, Solutions Operations Director