Trust in Learning
Trust in Success

EDUCATION

> *We wanted a cloud-native system that could grow with us. With PLANERGY, we've centralized procurement, reduced manual work, and achieved scalable growth without increasing staff.*
>
> **Drw Cannon, Finance Director at TiLA**

TiLA Academies (TiLA), a growing Multi-Academy Trust (MAT) managing multiple schools across England, recognized early on that their legacy system was no longer suited to their evolving needs.

As they planned to onboard more schools, TiLA sought **a streamlined, scalable, and cloud-based spend management solution**. Their search ended with PLANERGY, which delivered precisely what they needed: **cost savings, automation, and enhanced spend control**.

For more information visit **planergy.com/education**

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Challenges Before PLANERGY

Before PLANERGY, TiLA's finance and procurement processes were slow, paper-based, and prone to delays:

Manual Procurement Workflows:
Business managers signed off on physical invoices, which were then typed into the accounting system.

Lack of PO Management:
TiLA relied on invoice-based purchasing, resulting in delayed approvals and difficulty tracking spending.

Paper Overload:
Invoices and purchase orders (POs) were printed, signed, scanned, and archived, leading to storage challenges and inefficiencies.

School-Level Fragmentation:
IndivIndividual schools operated independently, with minimal central oversight, causing delays in budget tracking and reporting.

> *"Our process worked ok with just a few schools, but as we added more, the inefficiencies piled up. Delays in invoice processing and approvals became a real problem,"*
>
> **Drw Cannon, CFO, TiLA**

Why TiLA Chose PLANERGY

True Cloud:
PLANERGY's cloud architecture provides the flexibility and remote access they needed.

Purchase Order Automation:
PLANERGY enables pre-approval of spending, improving control and reducing disputes.

Seamless Integration with Xero:
The ability to link PLANERGY directly to Xero ensures real-time financial updates.

Scalable Growth:
As TiLA added new schools, PLANERGY absorbed the additional workload without needing extra headcount.

> *"With PLANERGY, we gained purchase order management and centralized invoice processing at a fraction of the cost of other solutions. It was a no-brainer"*
>
> **Drw Cannon, CFO, TiLA**

Implementation and Immediate Benefits

1. Centralized Procurement and Paperless Operations

PLANERGY allowed TiLA to transition to fully paperless procurement. Invoices were digitized and automated workflows, eliminating delays associated with physical approvals.

> *"We've significantly cut down on printing and storage costs. No more couriering piles of invoices between schools,"*
>
> **Drw Cannon, CFO, TiLA**

2. 75% Time Savings in Invoice Processing

By automating the capture and verification of invoices, TiLA significantly reduced the time spent on manual data entry.

> *"With PLANERGY, our team now processes more invoices faster without hiring additional staff. We've doubled the number of schools without increasing headcount,"*
>
> **Drw Cannon, CFO, TiLA**

3. Reduced Payment Delays

TiLA previously faced delays of up to two weeks with manual invoice processing. PLANERGY eliminated this bottleneck by allowing real-time processing and approvals.

> *"We've avoided late payment fees and strengthened supplier relationships thanks to faster invoice approvals,"*
>
> **Drw Cannon, CFO, TiLA**

4. Pre-Approval of Budgets

PLANERGY's PO system ensures that all purchases are pre-approved against budgets, minimizing overspending and the need for after-the-fact corrections.

> *"We now resolve spending issues before the purchase happens, saving us time and preventing budget overruns,"*
>
> **Drw Cannon, CFO, TiLA**

Overcoming MAT-Specific Challenges

Multi-academy trusts manage spend across multiple schools, handle high-volume low-value purchases, and balance autonomy with oversight. PLANERGY's features addressed these needs:

Decentralized Ordering, Centralized Control

Schools raise POs while finance retains oversight via automated approvals.

Departmental Budget Tracking

POs and invoices link to budget codes, providing real-time spend visibility.

User-Friendly Platform

Even non-finance staff found PLANERGY easy to use, driving teacher adoption.

Scalable Growth Without Additional Staff

When TiLA expanded from 4 to 8 schools, they maintained the same number of finance staff, thanks to PLANERGY's efficiency gains. Even with another school joining soon, Cannon expressed confidence in absorbing the additional workload without issue.

> 66 *With PLANERGY, we can grow without worrying about capacity. The system scales effortlessly,* 99
>
> **Drw Cannon, CFO, TiLA**

Measurable Results and ROI

Metric	Before PLANERGY	After PLANERGY	Impact
Invoice Processing Time	2 weeks	3 days	75% time savings
Finance Team Headcount	2.6 FTE for 4 schools	2.0 FTE for 8 schools	No additional hires despite growth
Paper-Based Approvals	100%	0%	Fully paperless, reduced admin costs
Late Payment Fees	Frequent	Rare	Faster payments, stronger supplier relationships

Future Plans:
Expanding PLANERGY's Capabilities

TiLA plans to further leverage PLANERGY's features, including **PunchOut integrations, scheduled reporting,** and PLANERGY's **budget forecasting** features to provide real-time budget updates to business managers and department heads.

> 66 *We're already using PunchOut integration with major suppliers like KCS and Amazon, and ESPO.* 99
>
> **Drw Cannon, CFO, TiLA**

Conclusion: A Perfect Fit for Multi-Academy Trusts

PLANERGY has transformed how TiLA manages procurement and finances, enabling them to scale efficiently, improve transparency, and save costs.

For other MATs considering an upgrade, Cannon's advice is clear.

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