



**FUTURE  
ACADEMIES**  
LIBERTAS PER CULTUM

CASE STUDY

## EDUCATION

“

*I needed to know the money we had was working for us—and that meant gaining full visibility, controlling spend, and eliminating inefficiencies. PLANERGY delivered that.*

”

**Alberta Edland, CFO, Future Academies**

Future Academies is a high-performing multi-academy trust operating across London and Hertfordshire. When Alberta Edland joined as Chief Financial Officer in April 2023, she brought with her a clear vision: streamline financial operations, reduce errors, and create meaningful visibility across the trust's procurement and budgeting processes.

Within a year, PLANERGY, in combination with Xero, helped the trust slash invoice processing resources by 50%, drive significant cost savings, and give Edland the financial confidence to lead with clarity.

For more information visit [planergy.com/education](https://planergy.com/education)

**PLANERGY**  
For Education

## Challenges Before PLANERGY

Before implementing PLANERGY, Future Academies relied on legacy systems like PSF and IRIS. These fragmented tools created data silos, inconsistent reporting, and burdensome manual processes across its 10 schools.



### Fragmented Processes:

Each school had its own finance officer manually keying invoices, often from paper copies.



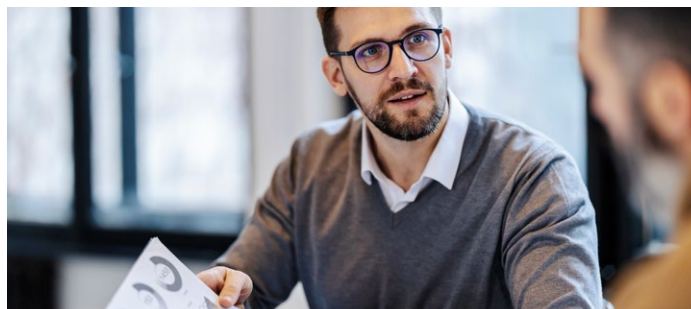
### Lack of Visibility:

Leadership had no real-time view of purchase orders, approvals, or commitments.



### Inefficient Approvals:

With PSF and IRIS, approvals lacked flexibility. Everything defaulted to department heads or central finance, slowing down decision-making.



*"What we were getting from PSF was about four to five times more expensive than PLANERGY and Xero combined,"*

Alberta Edland, CFO, Future Academies

## Why PLANERGY

With 15+ years of senior finance experience—including at the Harris Federation—Edland had already worked with bolt-on spend management systems like Concur. When evaluating new options, she was clear-eyed:

*"I needed AI and OCR technology, seamless sync to our finance system, and real-time spend visibility. PLANERGY ticked all those boxes."*

Alberta Edland, CFO, Future Academies

## Implementation & Onboarding

Future Academies took a phased onboarding approach across its 10 schools, supported closely by PLANERGY and Xero.

*"We didn't go big bang. We learned, improved, and got everyone live in two weeks. Training was excellent. Teachers and business managers loved how easy it was."*

Alberta Edland, CFO, Future Academies

# Results

## Invoice Processing Efficiency

- ✓ Invoice processing headcount reduced by 50%.
- ✓ Central team now handles invoices for multiple schools.
- ✓ Staff love the AI-powered OCR that cuts data entry to seconds.

*"We used to have one finance officer per school. Now it's one per two schools—and we didn't need to restructure. We just didn't rehire."*

Alberta Edland, CFO, Future Academies

## Smarter Procurement

- ✓ Real-time budget tracking stops overspending before it happens.
- ✓ Unlimited approval stages allow tailored workflows per school.
- ✓ Supplier onboarding is now fully controlled by operations.

*"Before, random suppliers would get added. Now, we've centralised and standardised it—and our procurement lead loves it."*

Alberta Edland, CFO, Future Academies

## User Adoption & Automation

- ✓ Over 400 users across the trust, including all teachers and business managers.
- ✓ Seamless Amazon PunchOut integration massively boosted adoption.

*"Teachers love PLANERGY because they can raise Amazon orders in minutes. That alone won them over."*

Alberta Edland, CFO, Future Academies



## Strategic Financial Control

- ✓ Alberta now monitors all spend pipelines from her dashboard.
- ✓ She prepares board reports with full confidence in the data.
- ✓ Planergy's integration with Power BI is next on the roadmap.

*"Now, I can go to the board and know the numbers are right. I don't just trust the team—I can see it myself."*

Alberta Edland, CFO, Future Academies

## ROI and Cost Savings

- ✓ £80,000–£90,000 saved this year through staffing efficiencies alone.
- ✓ Over £200,000 saved in cancelled or duplicate contracts discovered through better supplier visibility.
- ✓ Audit time and fees reduced due to cleaner, more accessible data.

*"We had a million-pound gap no one could explain. Now, I know where every pound is going—and where we can save."*

Alberta Edland, CFO, Future Academies





## Lessons for Other Trusts

Edland believes many trusts still underestimate what good spend management looks like.

“ Just because you can approve a PO doesn't mean you have real spend control. Your money should be working for you—and if it's not, your P2P process isn't working either. PLANERGY gave me clarity, control, and confidence. That's the real value—not just in savings, but in strategy. ”

Alberta Edland, CFO, Future Academies



## What's Next

Future Academies is now exploring enhanced reporting through Power BI and plans to expand PunchOut integrations beyond Amazon.

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