



Leathersellers'  
FEDERATION OF SCHOOLS

## CASE STUDY

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*PLANERGY enabled us to become a fully paperless finance function. The automation of the approval process and the integration with Xero have significantly improved our efficiency and control over spending.*

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**Leathersellers' Federation, a newly formed all-through / secondary multi-academy Trust based in London, faced challenges in managing their purchasing and financial processes efficiently.**

Before adopting PLANERGY, the Federation relied on Access Education Finance, a basic system that proved to be inadequate due to high licensing costs, manual processes, and limited control over

approvals. In 2023, the Federation transitioned to PLANERGY to streamline procurement, automate processes, and integrate seamlessly with their new finance system.

This case study highlights how PLANERGY has transformed the Federation's purchasing and finance operations, leading to improved efficiency, better control, and cost savings.

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**PLANERGY**  
For Education



## Challenges Before PLANERGY

Before implementing PLANERGY, the Federation encountered the following issues with Access Education Finance:



### Limited Approval Rules

The previous system **lacked robust approval workflows**, leading to inefficiencies. Invoices were processed manually and sent for approval via email or paper, resulting in delays.



### High Licensing Costs

Access Education Finance had high licensing fees, which restricted the number of users. This **forced the Federation to limit access**, making it harder for staff to use the system effectively.



### Manual Processes

The process of handling invoices **involved printing, and manually processing and matching to purchase orders**. This added unnecessary workload and slowed down the entire procurement cycle.

## Why PLANERGY?

The Federation decided to implement PLANERGY after a recommendation from their Xero provider Xero for Education (XfE), who suggested adding a procurement system. After reviewing several P2P options, the Federation selected PLANERGY due to its advanced features and seamless integration with XfE.

### Key reasons for choosing PLANERGY included:

#### ✓ Automated Approval Workflows

PLANERGY provides **customised and automated approval process**, ensuring that all purchases are pre-approved by the right person before invoices are processed. This eliminates the manual, time-consuming approval steps they faced with Access.

#### ✓ Unlimited User Licenses

PLANERGY offers **unlimited user licenses**, allowing the Federation to give access to all staff involved in procurement without worrying about additional licensing costs.

#### ✓ Integration with Xero

PLANERGY's **integration with Xero** allows for smooth financial operations, ensuring that all purchase orders and invoices were correctly reflected in their accounting system.



## Key Benefits of PLANERGY Implementation

- 1 Increased Efficiency**

PLANERGY automates many of the manual tasks that previously bogged down the Federation's finance team. By **digitising approvals and invoice matching**, the team no longer needs to manage paper trails or chase manual approvals, **leading to faster processing times** and more streamlined workflows.
- 2 Cost Savings**

The Federation saw a reduction in overall software costs. **Even with both PLANERGY and Xero, the cost was significantly lower** than what they had been paying for Access Education Finance. Additionally, the **unlimited user licenses allowed more staff members to participate** in procurement without incurring additional costs.
- 3 Improved Control and Compliance**

PLANERGY provides robust controls over the purchasing process, ensuring that all purchases are properly approved before payment. **This not only reduced the risk of unauthorised spending but also improves compliance** with internal financial policies. The system also provides a full audit trail, which is particularly beneficial during audits, allowing the Federation to easily demonstrate approvals and financial control.
- 4 Enhanced Transparency and Reporting**

With PLANERGY, **budget holders can now access real-time information** about their spending directly from the system. **This transparency reduces the need for staff to request updates from the finance team**, and allows for better decision-making at the school level. Reports on budgets, accruals, and purchase orders are readily available, providing greater insight into financial health.
- 5 User Adoption and Support**

Although the initial setup required a little effort, the Federation's **staff quickly adapted to PLANERGY due to its ease of use**. The finance team praised the system's user-friendly interface, which made it simple for both administrators and staff to navigate. Additionally, **PLANERGY's customer support team was super-responsive**, providing timely assistance, immediately addressing any issues that arose during the transition.
- 6 Automation of Procurement Processes**

The automation of purchase orders (POs) and invoice processing is a **game-changer for the Federation**. Previously, orders were often raised manually via email, which led to inefficiencies. PLANERGY's automated workflows ensure that all orders are processed electronically, saving time and reducing errors.





## Return on Investment (ROI)

While the Federation did not experience a drastic reduction in workload due to compliance enforcement, **PLANERGY offers significant value by streamlining processes, reducing licensing costs, and ensuring better financial control.** The system's ability to automate procurement and approval workflows frees up staff to focus on higher-value tasks, enhancing productivity across the whole finance team.

## Conclusion

**PLANERGY has revolutionized the way Leathersellers' Federation manages its purchasing and financial processes.**

By automating key tasks, reducing costs, and improving control, PLANERGY has enabled the Federation to operate more efficiently and transparently.

The system's scalability and seamless integration with Xero make it an ideal solution for multi-academy trusts seeking to improve their financial operations.

## According to Tony Marnham, Trust Finance Manager:

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*As soon as we saw PLANERGY, it was hands down, a no brainer for us. PLANERGY just offered a lot more than the other P2P options offered, going into our first audit, it was a fantastic to have this bit of armory to have if they said, oh, can you show us this approval? Click on screen. There you go, there is.*

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