



CASE STUDY



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I must have looked at demos from every major provider on the market, but none offered the right combination of budgetary control and automation

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Finance Manager at Hansdale Care Homes

Efficient financial and procurement management is critical for care homes navigating complex needs, high-volume low-value transactions, and strict budget constraints.

Hansdale Care Homes, operating five locations across England, Scotland, and Wales, struggled with outdated systems and labor-intensive processes that slowed down decision-making and created inefficiencies.

Recognizing the urgent need for a digital transformation, Finance Manager Rakesh spent years evaluating numerous procurement solutions.

It wasn't until he discovered PLANERGY—a comprehensive spend management platform—that he found a system capable of meeting all their requirements. PLANERGY's cloud-based automation, real-time budget tracking, and seamless integration with Sage accounting software made it the clear choice.

“ *PLANERGY was the only platform that offered the advanced features we needed while being easy to use and scalable*

Rakesh added



The Challenge: High Manual Workload, Limited Control

Before implementing PLANERGY, Hansdale Care Homes faced multiple challenges with their existing software, Care Blocks, which proved inefficient and outdated. The finance team handled procurement and invoice processing manually:



Manual Processes:

Purchase orders (POs) were raised on-site, and invoices scanned weekly before being printed and manually entered into Sage accounting software.



Paper Overload:

The head office lacked storage space, requiring off-site storage for files.



Inefficient Data Retrieval:

Finding historical invoices was time-consuming, slowing decision-making and audits.



Budget Management Issues:

The existing system lacked proper budgetary control, making it difficult to track departmental spending.

Why PLANERGY?

Hansdale Care Homes evaluated numerous solutions but found most lacking the flexibility to integrate advanced procurement automation with budget controls. After careful consideration, they chose PLANERGY for its unique combination of features:

Cloud-Based Platform:

Eliminating paper-based processes by storing all invoices and records in the cloud.

Seamless Integration with Sage:

Direct synchronization between PLANERGY and Sage 50 accounting software, reducing manual data entry.

Automated Invoice Processing:

Automatically scans, processes, and verifies invoices against purchase orders.

Real-Time Budget Controls:

Tracks spending against departmental budgets, ensuring financial discipline.

Unlimited User Licenses:

Accessible to finance staff, area managers, and directors without additional licensing costs.

Implementation and Immediate Impact

PLANERGY's implementation was smooth, with minimal disruption. Within weeks, Hansdale Care Homes experienced significant improvements:

1 Increased Efficiency

All purchase orders and invoices were digitized, ending the need for physical filing and off-site storage.

2 40% Time Savings in Procurement

Automated processes reduced the workload of the procurement team. Hansdale previously required a full-time employee to handle invoices. With PLANERGY, they achieved a 40% time savings, allowing that staff member to assist with other business-critical tasks like payroll and credit control.

3 Faster Financial Reporting

Hansdale reduced their month-end financial reporting time from 45 days to 30 days, improving overall financial visibility.

4 Eliminating Duplicate Invoices and Errors

PLANERGY's automation reduced duplicate invoices and errors, something Sage's built-in features struggled with before. This improvement streamlined reconciliation and ensured accurate data entry.

5 Scalable Reporting and Access Control

Area managers and directors can now access relevant financial information directly through PLANERGY, reducing dependency on the finance team.

"Before PLANERGY, area managers had to request information from the finance team. Now, they can retrieve what they need themselves, speeding up decision-making,"

Rakesh said.

Overcoming Unique Care Home Industry Challenges

The care home industry operates on high transaction volumes with relatively low individual values. Managing food deliveries, maintenance, and other essential services requires stringent budget controls and efficient procurement processes.

PLANERGY's features specifically address these challenges:

Real-Time Budget Monitoring

Ensures that care home managers do not exceed budget allocations for categories like food, maintenance, and activities.

High-Volume, Low-Value Management:

Automatically processes large numbers of small invoices, allowing Hansdale to maintain tight control without overburdening staff.

Petty Cash Management:

PLANERGY streamlines petty cash handling by digitizing all transactions and providing consolidated reports for easy retrieval.

Measurable Results and Return on Investment (ROI)

Since adopting PLANERGY, Hansdale Care Homes has experienced measurable benefits:

Metric	Before PLAN-ERGY	After PLAN-ERGY	Impact
Invoice Processing Time	5 days/week	3 days/week	40% time savings, allowing staff reallocation
Month-End Reporting	45 days	30 days	15-day reduction in reporting time
Storage Costs	Off-site storage fees	Eliminated	Significant cost savings
Duplicate Invoices	Frequent	Eliminated	Improved accuracy and compliance

Integration with Group Purchasing Organizations (GPOs)

Hansdale Care Homes benefits from membership in Spectrum, a UK-based group purchasing organization (GPO) that negotiates supplier discounts for care homes. PLANERGY complements this by tracking pricing trends and supplier performance, ensuring Hansdale maximizes savings and maintains service quality.

Additionally, PLANERGY's Price Watch feature alerts the team to price changes, helping them identify cost-saving opportunities and negotiate better terms with vendors.



The Future: Expanding PLANERGY's Role

Hansdale plans to explore further features within PLANERGY, including the Expense Management Module, which will enable care home staff to capture and upload receipts via mobile devices. This will help manage high-volume, low-value expenses more efficiently, particularly petty cash transactions.

Conclusion: A Game-Changer for UK Care Homes

PLANERGY has revolutionized Hansdale Care Homes' procurement and financial operations, enabling them to manage complex purchasing needs with ease and accuracy. Its automation, budget controls, and scalability make it an ideal solution for care homes seeking operational efficiency and cost savings.

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PLANERGY's flexibility, ease of use, and comprehensive features make it the perfect fit for any care home operator managing high volumes of transaction.

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PLANERGY
For Care Homes

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