

CASE STUDY



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*From **100** invoices a week to **600** with PLANERGY's invoice automation.*

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Bellevue Place Education Trust (BPET), a London-based Multi-Academy Trust comprising of 12 Primary schools, faced significant challenges in efficiently managing its purchasing and financial processes.

Prior to adopting PLANERGY, the Trust used Civica Financials, a financially prohibitive user structure that limited BPET to what they could achieve, and lacked the **flexibility and automation** that BPET needed to coincide with the Trust's growth plans

LicencesIn 2023, BPET decided to implement PLANERGY, a Spend Management platform that has **seamless bi-directional integration with Xero**, BPET's new financial software, to streamline Purchasing, Invoice Processing, and Budget Management.

This case study explores how PLANERGY transformed BPET's financial operations, providing key benefits such as **enhanced efficiency, cost savings, and improved transparency.**



Challenges Before PLANERGY

Before transitioning to PLANERGY, BPET encountered several issues with its previous system, Civica Financials:



Limited User Access

Civica had a strict licensing structure, allowing only a fixed number of users. This forced BPET to manage users manually, adding or removing them depending on needs.



Budget Tracking Difficulties

The Trust Key stakeholders across the Trust struggled to **identify and track their budgets and purchase orders (POs)**, resulting in overspend, bottlenecks and confusion.



Lack of Automation

Invoice processing in Civica required manual intervention, with **no automatic invoice scanning** which led to inefficiencies and increased administrative burdens.



Expensive Per-Transaction Fees

Civica's pricing structure included **fees for each transaction processed**, which added substantial costs, especially when dealing with small, frequent invoices (e.g., from Amazon).

Why PLANERGY?

After evaluating multiple options, BPET chose PLANERGY for several reasons:



Unlimited User Licenses

PLANERGY allows BPET to give access to unlimited relevant stakeholders across the Trust, including Teachers, Budget Holders, Head Teachers, and finance team members, without worrying about license limits.



Seamless bi-directional Integration with Xero

PLANERGY integrated easily with Xero, allowing BPET to maintain their existing finance team structure while extending purchase and approval capabilities to other staff.



Automated Invoice Scanning

The system automatically scan matches and processes invoices, eliminating manual allocation and reducing the need for additional staff.



Unrivalled Reporting Analysis and Visibility

PLANERGY provides centralized, school level, cost centre/departamental level dashboards that gives users the ability to **track purchase orders and understand what budget is available committed and remaining in real-time.**



Key Benefits of PLANERGY Implementation

1 Increased Efficiency

BPET saw a dramatic improvement in efficiency. **Before PLANERGY, the Trust processed about 100 invoices per week. With PLANERGY they can now handle 600 invoices per week with the same staff,** a significant increase in productivity. The automation features—such as automatic invoice matching and easy requisition approvals—were key to this improvement.

2 Cost Savings

The move to PLANERGY resulted in notable cost reductions. Civica's **per-transaction fees, which applied even to small invoices, were eliminated.** Additionally, PLANERGY's implementation cost was lower than Civica's, especially when BPET onboarded new schools. Instead of creating new setups from scratch, With PLANERGY you can set up a new school in a few minute, this would previously have taken 1-2 weeks.

Scalability

- 3 As BPET grew from 7 to 12 schools, PLANERGY's scalability became crucial. The platform allowed BPET to onboard new schools quickly without requiring external help, saving time and resources. The system's unlimited user capability also meant that any number of stakeholders could access the platform as needed.

4 Enhanced Control and Compliance

BPET's finance team gained more **control over spending and compliance** with PLANERGY's real-time budget tracking and PO approval workflows. Teachers & budget holders benefited from being able to see very clearly how much budget remained and what had already been committed, **improving financial discipline across the Trust.**

5 Improved User Experience and Adoption

One of BPET's primary goals was to find a system that **staff could adopt quickly** without extensive training. PLANERGY met this goal by providing an intuitive interface that staff members could navigate easily. BPET's Finance team, Budget Holders, and Head Teachers were able to start using the system with **minimal instruction**, which significantly reduced the friction often associated with implementing new software.

6 Customizable and Responsive Support

The BPET finance team appreciated the **regular meetings with PLANERGY's support team**, who provided ongoing updates and **customised solutions to address the Trust's specific needs.** Whether it was improving PO tracking or integrating new features, the **partnership with PLANERGY** was instrumental in continuously refining the system's use at BPET.

Return on Investment

BPET experienced significant ROI from the implementation of PLANERGY:

Time Savings

Staff are able to process **six times more invoices** without increasing headcount, leading to substantial time and cost savings.



Financial Transparency

PLANERGY enabled **real-time financial reporting**, reducing the administrative burden on finance teams and school administrators.



Cost Efficiency

The Trust's overall spend on **financial software decreased** with PLANERGY, despite adding more schools to the system. They also **avoided per-transaction fees**, making the platform more cost-effective over time.



Conclusion

PLANERGY has empowered Bellevue Place Education Trust to manage its purchasing and financial processes more efficiently and cost-effectively.

The platform's scalability, ease of use, and robust support have made it a valuable asset for the Trust, ensuring smooth financial operations as they continue to grow. With increased visibility into their budgets and the ability to process more invoices in less time, BPET is well-positioned to maintain financial health and operational efficiency for the foreseeable future.

In the words of BPET's finance team:

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PLANERGY has been like adding an extra member to our team without the associated costs. The system is intuitive, scalable, and incredibly efficient. It's a game-changer for our Trust.

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Before PLANERGY, we manually processed 100 invoices a week. Now, with automated invoice processing, we handle 600 a week—using the same team. That's a massive boost in productivity!

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