

CASE STUDY

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PLANERGY has streamlined our processes and given us much better control over our finances. It's been an excellent investment, and the support has been top-notch. We're really pleased with the improvements it has brought to our trust.

Phil, CFO of ILP

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Inspire Learning Partnership (ILP), a 5 School multi-academy trust in Hampshire, faced significant challenges in managing their procurement and financial processes efficiently.

The need for better spend control, enhanced automation, and transparency across multiple

schools led ILP to adopt PLANERGY in July 2024.

This case study details the impact of PLANERGY on ILP's operations, highlighting improvements in efficiency, compliance, and financial control.



Challenges Before PLANERGY

Before moving to PLANERGY, ILP experienced several pain points:



Manual Invoice Matching

Finance staff were required to **match invoices to purchase orders manually**, a process that continuously led to delays and errors.



Limited Procurement Control

Staff **could place orders** without proper approval, leading to potential unauthorised spending.



Lack of Budget Transparency

The absence of real-time budget tracking made it **difficult to monitor spending accurately**, and plan effectively.

ILP previously relied on an old legacy, school-based system, which proved cumbersome, with limited functionality for integration with other systems, such as Xero.

Why PLANERGY?

ILP chose PLANERGY due to its **robust automation capabilities, seamless integration with Xero, and ability to enforce procurement rules across schools**. Key factors influencing their decision included:

✓ Automated Invoice Processing

PLANERGY's **AI-driven** system significantly reduced manual tasks by **automating matching of POs and GRNs** the matching of invoices with purchase orders and goods receipts.

✓ User-Friendly Interface

PLANERGY provided an **intuitive platform**, enabling staff to **quickly adopt** the system and manage procurement **with minimal training**.

✓ Improved Budget Control

PLANERGY allowed ILP to **track and control their budgets in real-time**, making it easier for the finance team and budget holders to monitor financial health.



Key Benefits of PLANERGY Implementation

1 Increased Efficiency

PLANERGY's **automation of invoice matching and purchase order approvals** allowed ILP to streamline their processes. As Nikki, a finance team member, noted:

"It's so easy to use and it's brilliant how quick it is. When invoices come in, matching them off is very simple."

This reduction in manual entry saved time and allowed the finance team to focus on higher-value tasks rather than routine administrative work.

2 Enhanced Control and Compliance

PLANERGY ensured that no purchases were made without proper approval, thereby **reducing the risk of unauthorised spending**. The system enforced pre-approval workflows and provided a complete audit trail of all purchases.

"We've had a much better level of control over procurement since implementing PLANERGY,"
said Phil, CFO of ILP.

3 Improved Budget Transparency

One of the key improvements was **real-time budget tracking**, which allowed ILP to have greater insight into their financial position. By **linking budgets to departments and GL codes**, the system provided a detailed view of expenditure and remaining funds.

4 Seamless Integration with Xero

The seamless bi-directional integration between PLANERGY and Xero allowed ILP to manage their finances more effectively. **Data flowed seamlessly between the two systems**, reducing errors and ensuring up-to-date financial information.

"The integration has worked really well, and the ability to make adjustments in Xero is crucial for us,"

Phil added.

5 Scalability and Flexibility

As a growing multi-academy trust, ILP required a system that could **scale** with them. PLANERGY's **unlimited user licenses** and flexible configuration options allowed them to onboard new schools and staff easily, without incurring additional costs or complexity.

6 Responsive Support

ILP highlighted the excellent support provided by the PLANERGY team, noting that **any questions or issues were addressed quickly**.

"The support has been fantastic. We've always received a quick response whenever we've had questions or needed help,"

Nikki remarked.

Return on Investment (ROI)

ILP has seen clear returns from their investment in PLANERGY, with key benefits including:

Time Savings



Automation of invoice matching and approval processes **freed up significant time for the finance team**, allowing them to focus on strategic tasks.

Improved Compliance



The system ensured that all spending was pre-approved, reducing unauthorized purchases and **improving spend control across the Trust**.

Cost Efficiency



By eliminating manual processes and reducing errors, ILP **Saved time and money**. The automation also **reduced the need for additional staff** to handle administrative tasks.



Conclusion

PLANERGY has provided Inspired Learning Partnership with a powerful tool for managing procurement and finances across their schools.

By automating key processes, improving budget visibility, and integrating seamlessly with Xero, PLANERGY has transformed ILP's financial operations, enabling them to operate more efficiently and transparently.

Nikki, a finance team member, added:

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PLANERGY is so easy to use, and it's brilliant how quick everything is now. Matching invoices is seamless, and the support has been fantastic. Whenever I've had questions, the team has responded quickly and helped us resolve any issues right away. It's been a game-changer for us.

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