

CASE STUDY

“PLANERGY is the bridge between the finance team and what’s happening in schools.”

Lana Stoyles, Chief Procurement Officer, Nexus

Nexus Multi-Academy Trust is a growing Trust of **19 schools**, focused on empowering schools while maintaining strong central financial control.

As the Trust expanded and became VAT registered, decentralised invoice handling, complex approval workflows, and limited automation placed increasing pressure on both school staff and the central finance team.

Nexus selected **PLANERGY** to integrate seamlessly with **Sage Intacct**, streamline Procure-to-Pay, centralise invoice processing, automate approvals, improve budget visibility, strengthen compliance, and make purchasing easier for schools while giving finance and procurement teams greater control and efficiency.

For more case studies and information visit:
PLANERGY.com/education

EDUCATION

Clear Benefits across the Trust

- Easier purchasing for schools
- Faster approvals and fewer delays
- Better visibility and central control
- Stronger compliance and efficiency across the Trust

Moving to **PLANERGY**, Nexus has improved the experience for school staff while giving finance and procurement teams clearer visibility of invoices, approvals, and policy compliance.

The result is a more efficient, user-friendly process that saves time, reduces bottlenecks, and delivers cost savings across the Trust.

Challenges before PLANERGY

The Trust Needed a Better Way to Manage Purchasing and Invoices

Before PLANERGY, Nexus relied heavily on its finance system's native purchasing module. Much of the invoicing was being handled manually within the schools but it was creating too much friction as school staff found it very difficult to use.



“Before PLANERGY the system we used was difficult to navigate, approvals got stuck and emails were so generic people ignored them.

Now with PLANERGY, our schools find it much easier to use and approvals are straight forward.”

Karen Smith, CFO, Nexus

The lack of OCR meant invoices were still being processed manually across individual schools.

This decentralised approach made it difficult to maintain consistency.

Nexus wanted to remove that burden from the schools but without having to increase the size of the central finance team.

Month End was Particular Painful

Before PLANERGY, the existing purchasing setup was difficult to navigate and not especially intuitive for day-to-day users. Approval workflows were cumbersome to manage, cover arrangements were awkward when staff were absent, and transactions could easily get stuck in the system, creating extra manual work for the finance team.



“We found the old system very difficult to navigate. It wasn't user intuitive, setting up the approvals process, managing when people were off, and transactions getting stuck in the wrong period.”

Karen Smith, CFO, Nexus

The User Experience Made Adoption Harder Across Schools

For school staff, the experience was even more challenging.

Asking teachers and administrators to use a finance system designed for accountants reduced compliance and slowed down purchasing.

Approvals often required logging into multiple places, could only be completed on a laptop, and email notifications were so generic they were easy to ignore. This limited engagement, reduced efficiency, and made it harder to embed consistent purchasing processes across all schools.

Approvals and Permissions Were Too Hard to Manage

Nexus also found that approval roles, profiles, and permissions in their old system could be difficult to set up and even harder to troubleshoot.

If something stopped moving, it was not always clear why, and working out which setting or permission needed to be changed took time.

That lack of clarity made administration harder and slowed down the overall purchasing process.

The User Experience Made Adoption Harder Across Schools

The Trust needed a system that school-based staff could actually use with confidence, but the previous experience was clunky enough that schools were reluctant to use it widely. Approvals often required logging into multiple places, could only be completed on a laptop, and email notifications were so generic they were easy to ignore. This limited engagement, reduced efficiency, and made it harder to embed consistent purchasing processes across all schools.

Key Results: Ease of Use, Cost Savings, Visibility

Nexus implemented **PLANERGY** as a dedicated procure-to-pay platform alongside its finance system. The goal was clear: simplify purchasing and approvals for schools while giving the central team full visibility and control.

The impact was immediate.



“Heads and schools just use PLANERGY... they find it easier to use. They like the navigation of it better, that it’s easier to approve things.”

Karen Smith, CFO, Nexus

PLANERGY’s intuitive approval workflows removed complexity for both finance and non-finance users. Wayne highlights the difference: **“If something gets stuck, you can find out why it’s stuck. Whereas in the previous system, they were often a mystery.”**

Approvals became faster and more flexible, particularly for senior leaders who are frequently on the move. Lana Stoyles, Executive Director Business Transformation, notes,



“I’m faster on approvals now because PLANERGY works so well on my phone.”

Lana Stoyles, Chief Procurement Officer, Nexus

Email-based approvals with full context proved transformative. **“The email has the information in it that you need... in Intacct they were so generic that people treated them like spam,”** Karen says.

Improving Compliance and Visibility

One of the biggest gains for Nexus has been transparency. **“Being able to see at any point in time where the invoice is, who it’s sat with, who we need to chase,”** Gaynor Bailey, Transactional Finance Team Leader, explains, **“that wasn’t easy in the old system.”**

From a procurement perspective, **PLANERGY** has strengthened compliance. **“It’s a lot easier for us to pull out audit data and see where schools are not following the policy fully,”** says Lana.

For teachers and school staff, the experience feels familiar rather than intimidating. **“It doesn’t feel like you’re logging into an accounting package,”** Karen says. **“It feels like you’re logging into something simple.”**

PunchOut and Smarter Purchasing

While Nexus is selective about supplier strategy, PunchOut functionality has delivered clear benefits, particularly with Amazon Business.

“We don’t encourage spend with Amazon, but we know people do use it,” Lana explains. **“The process has been made ten times better just by that integration.”**

PLANERGY also supports Nexus’s commitment to local and SME suppliers, with upcoming functionality designed to give smaller vendors a PunchOut-like experience.

Support and Partnership

Beyond functionality, Nexus highlights **PLANERGY’s** approach to support as a key differentiator.

“A lot of the time we get sold the dream by tech companies,” Lana says. **“Whereas with PLANERGY, there’s honesty. If something can’t be done immediately, that’s explained, and you can see it going into development.”**

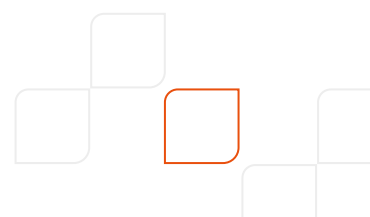


PLANERGY’s support is refreshingly honest and human. They’re responsive, knowledgeable, and you know you’re working with a team that genuinely cares.”

Karen Smith, CFO, Nexus

Karen agrees: **“It’s felt like a partnership from the beginning. PLANERGY are as responsive now as they were before we committed. That speaks to the ethos of the company.”**

“We feel important all the time,” Lana adds. **“That’s not the norm.”**



Key Benefits

1. Simple for Schools. Clear for Finance.

PLANERGY gives Nexus an easier way to buy and approve, making the process much smoother for both school staff and finance teams.

PLANERGY feels simple, clear, and approachable, which has helped drive stronger adoption and made day-to-day purchasing much easier across the Trust.

“It doesn’t feel like you’re logging into an accounting package.”

2. Faster Approvals, Fewer Delays

With mobile access, email approvals, and clear supporting evidence, **PLANERGY** helps Nexus keep approvals moving quickly and with less friction. It reduces the delays and keeps purchasing moving without unnecessary back-and-forth.

“I can approve on my phone or desktop with confidence as I can see live budgets and all the supporting paperwork as well.”

✔ 1409 Happy Users onboarded in days

✔ 51,000 invoices per year processed automatically

✔ Seamless integration with Sage Intacct

✔ Live Dashboards for Budgets, Spending and Approvals

✔ Free Unlimited Users and Invoice Scans

3. Better Visibility at Every Step

Nexus can now see exactly where invoices sit, who needs to act, and where bottlenecks are forming, making it much easier to chase delays, manage bottlenecks, and keep control of the process.

“Being able to see at any point in time where the invoice is, who it’s sat with, and who we need to chase, that’s made a real difference.”

4. Support that Feels Like Partnership

PLANERGY’s honest, responsive approach has given Nexus confidence from day one, with support that feels consistent, human, and genuinely collaborative.

“Working with PLANERGY has felt like a partnership from the beginning.”

5. Efficiency That Delivers Real Value

By reducing manual effort and improving day-to-day processes, **PLANERGY** has helped Nexus save time, work more efficiently, and realise clear value from the system.

“It’s pays for itself over and over.”

6. Budget Overruns Are a Thing of the Past

Using **PLANERGY**’s approval workflows, Nexus has far greater control over spend before it happens. Requests are reviewed earlier, approvals are clearer, and policy compliance is much easier to enforce, helping the Trust prevent unapproved or off-process spend and keep budgets firmly under control.

“Compliance has definitely gone up. It’s much easier to find split purchases and see where schools aren’t following policy.”

Nightingale House, 46-48 East Street, Epsom, Surrey, United Kingdom KT17 1HQ

Phone: 0845 591 2724 (XT 208)
Email: enquiry@planergy.com

For more information: planergy.com/education

Sage
Intacct

PLANERGY[™]
BETTER SPEND MANAGEMENT