

## Sapphire Case Study: Citizen's Advice Bureau



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**Peter Watson**  
Financial Controller

**SUNSYSTEMS**



The Citizens Advice Bureau service was founded in 1939 to offer emergency advice to families during World War II. Today, the service has over 25,000 workers, the majority of whom are volunteers, and helps people resolve their legal, money and other problems through providing free, confidential and impartial advice and by influencing policy-makers. Every Citizens Advice Bureau is an independent registered charity reliant on funding from local authorities, businesses, charitable trusts and individual donations.

The bureaux provide regular advice from over 2,800 locations and help to solve nearly six million new problems each year. Bureaux in England, Wales and Northern Ireland are all members of Citizens Advice, the national association which sets standards for advice, and equal opportunities, supports bureaux with an information system, training for staff and volunteers and other services. Citizens Advice also coordinates social policy, media, publicity and parliamentary work. Full detail of the Citizens Advice service can be found at their website [www.citizensadvice.org.uk](http://www.citizensadvice.org.uk)

### The Review Process

Peter Watson manages the financial software systems and data management environment for Citizens Advice – a post that he has now held for 3 years. Peter was already highly experienced in using SunSystems through his previous role as Finance and Performance Management Manager at the Terence Higgins Trust. When Peter joined Citizens Advice he undertook the challenge of improving the way in which Citizens Advice ran their financial systems and data management processes.

Although Peter had 10 years experience of working with SunSystems under his belt, he decided to include a number of other systems in his review to ensure that Citizens Advice was still using the best available solution. Peter comments "Citizens Advice is a registered charity dependent on grants from government, corporate donors and charitable trusts. We have a duty to our donors in getting the best value for money".

Peter and his project team began their review. After some informal market research – conducted both online and through attending a number of tradeshow, his final product shortlist contained SunSystems, Great Plains, Sageline 100 and Openaccounts. Peter and his project team looked carefully at what features each product had to offer, together with the types of support and services that would be required to implement the new system.

During this process it became clear to Peter that SunSystems was still the best solution for Citizens Advice. On commenting on CitA's decision to stay with SunSystems Peter says "although some of the other products we looked at were very slick and attractive, once you started to look "under the bonnet" you would see that some of the functionality that's crucial in managing your finance operation, proved to be extremely inflexible and somewhat limited – this ultimately led us to the decision that SunSystems still offered the best functionality and greatest flexibility for what we needed to do."

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**Financial Controller**



So, with the question of the software settled, Peter and his project team then decided review their supplier relationship. Peter and his team shortlisted both Sapphire and four other SunSystems resellers – all of whom were asked to present an overview of their solutions and services. In addition to these presentations, Peter also wanted to talk to actual clients of each reseller to discover first-hand how they felt about the service they were receiving. Peter revealed that “up until we took these references, things were pretty even between all the resellers – each gave us a good presentation, answered all the questions we needed them to and all were able to demonstrate that they had the capacity to support an organisation as large as Citizens Advice.” He adds “Things become far clearer when I took up the references. The Sapphire clients that we spoke to had nothing but praise for the quality and level of support they were receiving from Sapphire, whereas most of the other reseller’s clients could be described at best as ‘reasonably luke warm’ in the way they felt about their service providers!” It was these impeccable references, coupled with the fact that Sapphire’s contract offered better value than any of the others, that swung the vote in Sapphire’s favour - and the panel unanimously agreed that Sapphire would be the best choice for supporting Citizens Advice.

So, two years on, does Peter feel he made the right decision? “Absolutely...” he responds, “...Sapphire has demonstrated time and time again that we made the right decision. All of Sapphire’s support staff are very experienced with SunSystems so we know we are going to get well-qualified support, and be able to resolve most issues for on the first call. There is also comfort in knowing that if anything untoward should happen to our system, then Sapphire are on hand to help us fix it – and fix it quickly.”

When asked whether Citizens Advice had ever had reason to rely on Sapphire to fix a critical issue Peter recalls, “At one time, we moved a number of applications around on our internal servers which caused some of our management reports to go missing. As this was a real show-stopper for us, Sapphire immediately dispatched one of their Technical Application Consultants who managed to locate and fix the problem for us in no time at all. This rapid response from Sapphire ensured that downtime was absolutely minimal and that Citizens Advice suffered no untoward effects as a result of this move. Without his help, the consequences to Citizens Advice would have been unthinkable!”

#### **So what’s next for SunSystems at Citizens Advice?**

At the moment Peter is being kept busy by his current project to install a new membership and CRM system. However he is keen in the long term to expand the functionality of SunSystems to help streamline financial processes in other areas of the organisation. He reveals “at some point in the future we hope to add both online purchase order processing and expense management facilities – these two applications will help improve collaboration at Citizens Advice and enable us to reduce administrative overheads in processing large volumes of paperwork”.

In addition to these complimentary products, Peter is a big fan of SunSystems Vision – the management reporting tool for SunSystems.

“Vision is a fantastic tool for management reporting and I believe we could do much more with the product. The ideal scenario is to have Vision Executive on every desktop in Citizens Advice which will allow people to run their own realtime reports on the SunSystems financial and business data, as and when they need to”.

In summarising his experiences of Sapphire, Peter says “our relationship with Sapphire is such that I would have absolutely no hesitation in recommending them to other





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organisations. I feel that the entire team at Sapphire is always willing to go that extra mile to ensure that we receive the best possible service, and we look forward to continuing this relationship well into the future.”

When asked if he had any advice for organisations looking for a new business partner he says “If you really want to test the true mettle of an organisation then ask them to provide you with client references. These can be a great differentiator when selecting who you ought to be doing business with.”

Full details of the Citizen’s Advice service can be found at their website [www.citizensadvice.org.uk](http://www.citizensadvice.org.uk)

