

Sapphire Case Study: Citizens Advice Service

History on Citizens Advice Service and background to the case

The Citizens Advice service helps people resolve their legal, financial and other problems by providing free, independent, confidential and impartial advice on personal rights and responsibilities. In the last year it has helped 1.9 million people in the United Kingdom to solve six million problems. Nearly half the UK population has used the service at some point in their lives.

The most public face of the organisation is the Citizens Advice Bureaux. These began as an emergency war service. World War II was declared on 3 September 1939 and the first 200 bureaux opened their doors the very next day.

Today there are 416 Citizens Advice Bureaux across England and Wales and a further 22 in Northern Ireland. All of these are independent registered charities.

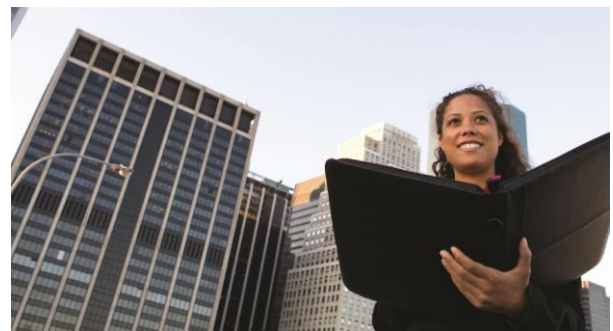
The bureaux cover 3,300 locations as diverse as libraries, post offices, prisons, magistrates courts and mobile vans that serve rural communities. Of the 26,000 Citizens Advice staff, 20,000 of them are volunteers, delivering £85 million worth of hours a year between them.

All bureaux are members of Citizens Advice, the membership organisation - also an independent registered charity - that provides training and support and coordinates national policy work.

Business Profile

Number of users:

- ▶ 20 Finance
- ▶ 4 Professional
- ▶ 23 Logistic
- ▶ 20 Typically logged in at any one time
– expected to grow to 35



Version used: SAP Business One 8.8

Sapphire customer since: February 2010

Cost saving with SAP Business One: £200,000 pa

Return on investment: 7 months

Sector: NFP/Charity

“From the immediate time saving improvements to better reporting and integration we have seen profound improvements to our organisation.”

Peter Watson

Citizens Advice

Setting the strategy

The income of Citizens Advice Bureaux totalled £153 million in 2008/09. Bureaux receive money from local authorities, the Legal Services Commission, Lottery funds, primary care trusts, charitable trusts, companies and individuals. By comparison, the income of Citizens Advice service totalled £56 million in the same year. This was largely funded through government grants. With such a diverse structure and so many different funding sources, it is critical that reporting is kept as transparent as possible.

In addition, any productivity benefits that can arise from automated processes are extremely valuable – freeing up paid staff to deliver the highest value work possible.

Historically the processes of reporting were complex and took up a lot of human resource. Citizens Advice would produce management reports by printing out accounting information from its [Infor FMS SunSystems](#) solution and then manually type the data into Excel.

However, as a SunSystems user of almost 20 years, Citizens Advice wanted to adopt an improved reporting system without sacrificing the reliability and stability of the existing investment:

“When you have almost two decades of experience with a solution you become expert at the ‘shortcuts’ that reduce workflows – right down to the keystrokes. We did not want to lose that as we improved reporting,” explains Peter Watson, Head of Strategy and Management Information, Citizens Advice.

As a result Citizens Advice looked at the top resellers supporting SunSystems. It drew up a shortlist of five possible providers, then chose Infor partner Sapphire Systems on the basis of price, service and a proactive attitude, demonstrating the right ideas and solutions that would work for Citizens Advice.

Getting business specific

[Infor FMS SunSystems Query & Analysis](#) - the management reporting tool for SunSystems - was chosen as it delivered the best functionality and was easily understood by all the team at Citizens Advice.

Watson continues: “It soon became apparent that the ideal scenario would be to have Query & Analysis on every desktop in Citizens Advice. This would allow people to run their own real-time reports on the SunSystems financial and business data, as and when they needed to. However, we realised it would be too expensive, so we started to drill down and set Sapphire to work to deliver the maximum results from SunSystems.”

In order to deliver an alternative to Query & Analysis on every PC, Sapphire developed automated overnight reports that run and drop into managers’ folders. These are joined by listings that enable the finance team to see transaction level detail every day.

The most important short-term deliverable was a simple chart of accounts that could enable quick analysis. This covered the various departments, the different funding sources and ongoing project. The flexibility of analysis codes within SunSystems enables all of these parameters to be tracked easily without making additional demands on staff.

Citizens Advice has also made use of extensions that integrate Infor FMS SunSystems. A purchase invoice approval system now automates processes for supplier payment. In addition, web-based software has been put in place that delivers information straight into ledgers with no need to re-key.

Seeing results

Infor FMS SunSystems has made a huge contribution to improved productivity within Citizens Advice: the integration of reporting capabilities with the accounting elements of SunSystems has eliminated the need for printing and manually re-keying data – saving significant amounts of time in the back office.

The integration of invoice information into the system has sped up workflow even further and accelerated payment of invoices, improving supplier relationships.

Both of these benefits are clear examples of what can be achieved when IT is aligned to business processes.

Most importantly Citizens Advice service managers have been given the ability to make ad hoc requests for detailed management information and have it delivered quickly, in an easily understood format. Watson explains: “With SunSystems Query & Analysis you get superb manipulation possibilities so everyone sees a great finished product.”

Watson concludes: “For anyone considering this kind of project it is critical that you look at your business model and the information you need to provide to the organisation. This means paying close attention to the workflows that are your responsibility.

“You also need to think about what you need in terms of processing, reporting and how you need to get information to people. This gives you a solid base to go out to tender. Make sure you scrutinise a wide range of products and suppliers.

“You need to be able to interview end users on not only the product but the relationship they have with the supplier. This is as important as the solution itself.

“It is a testimony to this strategy, the strength of our relationship with Sapphire and the solidity of Infor FMS SunSystems that we make such extended use of the solution. From the immediate time saving improvements to better reporting and integration we have seen profound improvements to our organisation.”



For more information on SunSystems please call our Product Advisory Team on 020 7648 2000.