

CASE STUDY | NONPROFIT

Lewis-Manning Hospice Care

iplicit

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lewis-manning.org.uk



Sector
Nonprofit



Previous Finance System
Exchequer



Number of iplicit users
3 full users



Go Live Date
March 2023

‘We couldn’t have done it without iplicit’, says expanding charity Lewis-Manning Hospice Care

Upgrading the accounting software transformed the efficiency of the Lewis-Manning Hospice finance team, saving days every month. But it also made a real difference to the charity’s vital front-line work.

“Four years ago, we were seeing around 350 patients a year,” says Susan Newcombe, Director of Retail.

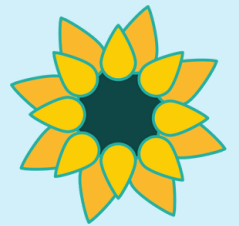
“Today, we’re seeing more than 800 patients a year, so that alone – in terms of staffing capacity and managing their time – is an indication of how our workloads have dramatically increased.

“iplicit really has been central in helping us to manage that transition.”

“The analysis is so much better. We have been able to split the fundraising department into eight different cost centres and we have 33 cost centres in total across the organisation.”



We looked at other packages, including Sage and Xero, but those are huge organisations and if you’ve got an issue, you can’t just put in a call and get a response within 24 hours. With iplicit being UK-based, there’s someone on the end of the phone or who will respond quickly to an email. It was important to have that sort of support.



Florence Tyler
Assistant Accountant



About Lewis-Manning

Lewis-Manning Hospice Care supports people with life limiting illnesses, both at its Poole day hospice and at clinics across the East Dorset community, as well as providing family and bereavement support.

It has income of around £3.4m, with around 100 staff, a series of charity shops and a division for marketing and fundraising. The hospice has subsidiary companies running the shops and a fundraising lottery.

“Our services are expanding and the number of charity shops has more than doubled over the last three years. We just couldn’t keep up with the manual entry required for that number of invoices and bank transactions,” says Florence Tyler, Assistant Accountant.

‘Old, clunky and paper-based’

“We had a system that was very old and clunky. We were going to directors, asking them to sign off hard copy invoices for authorisation,” says Florence.

Trevor Arthur, Finance Officer and Company Secretary, adds: “Everything took a long time and we had to input all the data ourselves in the finance department.

“For example, people had to fill in their expenses and timesheets on A4 paper and send them to their manager, who signed them off and gave them to us so that we typed in the information and hopefully paid it by payday.”

Florence adds: “If the director was off and I needed their authorisation, or they weren’t working in the office, it was very difficult. You were trying to track down emails that contained the relevant authorisation – and when the auditors asked to see an authorisation, you knew you had it, but whether you could find it easily was another thing.”

Allocating salaries to the correct shops was one task that took four hours of work in a spreadsheet every month. “Accuracy was an issue, because when you’re number crunching on such a scale, mistakes happen. Whereas Ipllicit has eliminated this issue,” says Susan.

The heavy reliance on paperwork also required somewhere to store it – 166 miles away in Birmingham.

“We had to print off a hard copy of every invoice that came in,” says Florence.

“

We had a system that was very old and clunky. We were going to directors, asking them to sign off hard copy invoices for authorisation.

Florence Tyler
Assistant Accountant

“We were running out of space for storing it, so we’d keep it on site until we’d had our audit and then we were shipping 20-plus boxes to an archive company in Birmingham and incurring monthly fees to keep them for at least seven years.”

‘We had to streamline or sink’

The Lewis-Manning team were well aware an upgrade was called for.

“With the new shops and everything else that was coming online, we were under so much pressure that if we didn’t do something to streamline our procedures or employ more staff, we would be sinking,” says Florence.





We used to do our bank reconciliation manually at the end of the month. Now iplicit goes to the bank feed, drags in all the information and we just review the matches.

Trevor Arthur
Finance Officer and Company Secretary

“We’d have faced the costs of additional staff to keep our old Exchequer system. We knew the time had come when it would be more beneficial to invest in a new system, which we needed anyway, to give us better oversight of the finances.

“We sat down with the finance director and drew up a ‘needs list’ and a ‘wish list’.

“We knew we needed software with a workflow system, because we couldn’t keep chasing directors for signatures, and ideally others in the organisation should be able to use the software themselves.

“It had to be easy to pick up and self-explanatory, so people outside finance wouldn’t feel overwhelmed by it. And we needed something totally electronic because we had so much paper.

“We looked at other packages, including Sage and Xero, but those are huge organisations and if you’ve got an issue, you can’t just put in a call and get a response within 24 hours,” says Florence.

“With iplicit being UK-based, there’s someone on the end of the phone or who will respond quickly to an email. It was important to have that sort of support.”

Implementing iplicit

Lewis-Manning enjoyed a smooth implementation process with iplicit and the team is full of praise for Helen Gouldbourne, Implementation Training and Partner Onboarding Lead.

“Whenever we needed support with the system, Helen was there,” says Trevor.

“We’d say, ‘Can it do this?’ and she’d say ‘Yes, it can, look at this’.

“We always said when the new system could do the same job as Exchequer, that’s the point when we’d move over. But when we went live, we already had so much more than we had with the old system, and it’s continually evolving.”

Flo adds: “I’ve always found the support team really helpful. Since we’ve gone live, we’ve found if we ever had a problem and we ping support an email, they’ll get back more or less the same day and most of the time they’ll show us how to do something for ourselves.”

‘We’ve saved days, not hours’

iplicit has transformed working life at Lewis-Manning – starting with the time-consuming manual tasks.

“We used to do our bank reconciliation manually at the end of the month. Now iplicit goes to the bank feed, drags in all the information and we just review the matches,” says Trevor.

“That’s been huge – but being able to integrate our shop till system with iplicit has probably been even bigger.

“We used to spend two or three days at the end of the month updating all the retail sales figures. We had to type everything in manually, with more than 500 transactions a month for the retail operation alone. With iplicit, we’ve got a daily import file that comes from the tills in the shops and we just upload 16-18 invoices.”

Expenses are completed by the staff on the road, who use the iplicit mobile app to photograph receipts and submit their claims. Budget holders can approve spending wherever they are.

“Instead of returning to head office to be given a pile of invoices to sign and be scanned, I can log into iplicit on my phone, see the invoices allocated to my budget code or budget line and authorise them in real time,” says Susan.

A complex system for authorising spending on bank staff has been similarly simplified. Shop managers just put the hours into iplicit and they are reviewed by the relevant budget holder.

“That wipes out the need for a lot of emails and was one of the biggest game-changers I saw,” says Susan.

“You’re talking about saving a couple of days, rather than just hours.”

‘People can see information in real time’

The benefits of iplicit go beyond saving time and resources. The charity is now able to track and analyse the finances in ways it couldn’t before.

“The analysis is so much better. We have been able to split the fundraising department into eight different cost centres and we have 33 cost centres in total across the organisation,” says Florence.

“We use iplicit’s project costing features for proper analysis. For example, if we want to know how our Muddy Dog Dash went, we can go into Projects and ask for all the associated costs for that event to see how much we actually raised.”

Susan adds: “In retail, we can look back over the past three years to see where the trends are and where our income’s coming from, allowing us to plan for the coming year.”

Staff can serve themselves with the information they need. “People are able to see information in real time, rather than having to wait until management accounts are sent out the next month,” says Florence.



Having expanded our chain of shops, we’ve given ourselves a lot more work and we have more income coming through the system. We couldn’t have done all that without iplicit. We’d have needed a team of 100.

Susan Newcombe
Director of Retail

“I was in charge of creating weekly reports to send to the people that needed them, so I needed to remember on a Friday to send that income report to the fundraising team, our CEO and the Director of Fundraising, and of course I might be away or things might be incredibly busy. Now, using iplicit’s scheduler, all that is done for me.”

Trevor adds: “People can log in and look at things themselves rather than say ‘Can you give us this information by Wednesday?’.

“We’re developing specific dashboards for each department, so the first screen they see when they log in will be their major KPI.”





iplicit has even powered a new avenue of income for the charity – house clearances.

“It’s a new initiative this year and there’s quite a process involved,” says Susan.

“Someone will do an appraisal which is translated into a quotation, which is emailed off to the potential customer. I’m off-site a lot but need to access this information, which previously meant phoning head office.

“Now, the quotes and the customer data are held in iplicit, compliant with GDPR, and if I get a phone call about the quotation, I have the information at my fingertips. Then once the customer accepts the quotation, I push the button and an invoice is raised – and all the income is allocated to the correct house clearance.”

‘We’d have needed a team of 100’

For a charity facing greatly increased demands, iplicit has been an enormous boost.

“We’re in the middle of a growth strategy, both in the reach of our clinical services and in our income-generating activities,” says Susan.

“Having expanded our chain of shops, we’ve given ourselves a lot more work and we have more income coming through the system.

“We couldn’t have done all that without iplicit. We’d have needed a team of 100.”

Accounting software for charities and nonprofits

iplicit is empowering nonprofit organisations around the world to take control of their finance operations and focus on what really matters. iplicit can help you upgrade with a number of solutions to support with accounting software for charities

True-cloud accounting software without the sky-high pricing. iplicit is the award-winning accounting solution that pays for itself.

With iplicit's automation tools you can close month end fast and with unlimited reporting dimensions, get critical insights quickly.

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