



Case Study

Emergency-Free Budgeting and Forecasting At St John Ambulance SA

CUSTOMER PROFILE

A self-funded charitable organisation, St John Ambulance SA provides high quality first aid services as well as a range of community care services for the aged, younger people with a disability and the socially isolated

BUSINESS SITUATION

Budgeting and forecasting process at St John was a painful and prolonged exercise that was time consuming and labour intensive. They needed better security & transparency between the business units and gain participation from the Responsible Unit Owners to align their budgets & business plans

SOLUTION

Automate and streamline its budgeting & planning process to grow the organisation

SOFTWARE

Microsoft Forecaster
Microsoft Dynamics GP

"The planning and budgeting process now starts earlier and is put to bed earlier...The potential to forecast well into the future fosters better decision making – we are already creating new ideas for next year's budget. "

*- Ms Sharyn Mitten
Executive Manager, Corporate Services
St John Ambulance SA*

St John Ambulance Australia has been active in Australia for over 125 years. A self-funded charitable organisation, St John Ambulance SA provides a range of community care services for the aged, younger people with a disability and the socially isolated, and it has a well developed youth program. The organisation is dedicated to helping people in sickness, distress, suffering or danger and provides first aid kits, first aid training and first aid services at community and public events, and assistance during national disaster relief, through volunteers.

In the past, the budgeting and forecasting process at St John was a painful and prolonged exercise that was time consuming and labour intensive - keying replication data was the norm. Forecast and budget integrity were constantly challenged by inaccuracy and costly errors while lack of document control, security and the inaccessibility and lack of integration with its financial data all impacted on St John's business performance. The planning and budgeting cycles were slow and long and St John found it difficult to create additional budget sets to evaluate alternative value outcomes.

"Our budgeting and planning process required evaluation to ensure better alignment of business plans and participation by Responsible Unit Owners who are responsible for preparing the budget," explained Sharyn Mitten, St John Ambulance SA's Executive Manager of Corporate Services. "Streamlining of business processes and data integrity are paramount considerations to ensure every opportunity for successful growth of our organisation and collaboration between managers. I can't begin to tell you how important that is. It is huge. "

Spreadsheets were the primary budgeting and forecasting tool used by St John in the past and it was problematic with data processing, spreadsheet and entering errors, version control madness and lack of



St John Ambulance Australia

security. A spreadsheet-driven budget process also restricted St John from tracking the progress being made on the budgets and forecasts.

To enable a better-quality budgeting and planning process, St John adopted Microsoft Forecaster. The Microsoft budgeting and forecasting solution integrated easily into St John's existing ERP and FRx Software financial reporting solution and allows staff and volunteers to drill down into greater budget details and reports and easily create additional budget versions. The implementation went live after 2 weeks and the acceptance of the system was exceptionally high from the Responsible Unit Owners.

"The take up rate was excellent and it certainly created a buzz," said Sharyn Mitten. "We were able to create reports immediately. Ease of use and push button technology accelerated the pace of business. Work flow and the approval process improved dramatically as did transparency between the units. The time taken to produce Board reports reduced considerably. We had full security and control over the entire process."

CDC Praxa was the systems integrator appointed by St John and the implementation of Microsoft Forecaster commenced in March 2009. "There was a need to integrate Forecaster into GP and CDC Praxa understands the complete product suite of Microsoft Great Plains, FRx and Forecaster," said Sharyn Mitten. "CDC Praxa showed us the functionality and benefits of Forecaster. It was fulfilling to work with CDC Praxa's professional services

staff."

The impact of change at St John Ambulance SA has been overwhelming. The organisation has improved on the collaboration and communication between the different Responsible Unit Owners and is able to manage the security, approval and track budget workflow with confidence. Training was kept to a bare minimum as all users are familiar with the Microsoft menu structure.

"The planning and budgeting process now starts earlier and is put to bed earlier," said Sharyn Mitten. "There is no time consuming consolidation in Excel as this is all automated and no re-keying of actuals as Forecaster is integrated with Microsoft GP. Depreciation was easily set up. Revenue modelling and addition of memo fields allowed us to be kept informed. We are able to easily track the progress of where each unit is at in the budget process and users are able to access the information remotely. The potential to forecast well into the future fosters better decision making – we are already creating new ideas for next year's budget."



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