



CASE STUDY: AT THE HEART OF THE MATTER

When it came time to upgrade to a Windows-based accounting system, the British Heart Foundation chose Dataflow32.

CHARITY



Founded in 1961, the British Heart Foundation (BHF) is one of the UK's top charities, with an income last year of £69 million.

Nearly 50% of its income is from legacies while the remaining half comes from a range of fundraising activities; including the annual London to Brighton Bike Ride and the sale of donated goods in over 400 BHF shops.

Over 77% of the money raised by the BHF goes to support medical research and last year saw the launch of a new Cardiovascular Initiative to fund new laboratories, equipment and research groups.

The rest of the income goes into education and patient care, including work in schools and providing vital equipment for hospitals, GPs and ambulances.

Managing a charity on this scale presents similar challenges to those of a multi-site, multi-national corporation. Although the accounting requirements are similar, there are some noticeable differences between charities and conventional companies.

At the BHF, the 11-strong accounts team is headed by Chief Accountant David Reynolds. When he joined the charity 23 years ago, its incomes were just £1.5 million.

As the Charity grew and revenues increased, David had overseen the previous systems upgrade, back in 1990. As the new millennium dawned and the organisation continued to expand, it was time to move towards a more integrated business solution.

WHY DATAFLOW?

When it came time to review true 32-bit Windows solutions, the BHF was surprised by the lack of alternatives. Eventually, they shortlisted three options: Access, Dynamics and Dataflow32.

The BHF was reluctant to implement Dynamics as they had experienced problems with US software vendors being unable to respond to requests for UK-specific modifications.

Access, on the other hand, expected the BHF to change their accounting practices to suit the software, rather than the other way around.

Like most charities the BHF has specific accounting requirements; such as the ability to post recurring debits and credits, charge VAT to cost centres and not the VAT account, reimburse expenses without going through the purchase ledger and nominal ledger cheque writing.

The decision was made to purchase Dataflow32 and a timescale was put in place for installation and migration, without the need to run both systems in parallel.

“DATAFLOW WAS THE ONLY SOLUTION THAT PROVIDED US WITH THE FEATURES AND FLEXIBILITY WE WERE USED TO AND COULD MEET ALL OUR NEW REQUIREMENTS.”

DAVID REYNOLDS CHIEF ACCOUNTANT, BHF

INSTANT SWITCHOVER

Most new software packages are run alongside existing systems for a period of time but with only a small staff and pressure to deliver reports, parallel testing was not a luxury the BHF could afford.

"I have to admit to being a little nervous about making the switch instantaneously," says Dariush Mogtader, Managing Director at Dataflow. "We were confident about our software, but with so many factors involved we would have preferred a period of transition to iron out any problems."

On 13 July the BHF stopped using its existing software and Dataflow had just four days to convert all the data, test the system and provide some initial training.

On the 17 July the 20-user Dataflow32 system went live at the BHF.

David had a holiday booked the following month and needed to run a number of management reports before he could relax with his family. 3 weeks after installation, the report were run and David was enjoying some quality time in sun.

POST-IMPLEMENTATION SUPPORT

Training is vital to user acceptance and Dataflow provided full-time on-site support for the first week to ensure users were fully conversant with the new system.

"GOOD SUPPORT IS PROBABLY MORE IMPORTANT THAN THE SOFTWARE ITSELF. AS WELL AS SEEING US THROUGH THOSE CRITICAL FIRST TWO WEEKS, DATAFLOW CONTINUE TO PROVIDE SUPPORT AS WE PUT THE SYSTEM THROUGH ITS PACES."

"We were delighted with the move. Although the instant switch-over was a challenge, it merely went to prove the strength and flexibility of the software" concludes Darius.

Now that Dataflow is well established, the BHF is extending its use and realising some of the advantages of selecting a true Windows solution.

The ability to import and export data with simple drag and drop commands is proving to be a major benefit. Accruals data on 120 different items from Microsoft Excel can be imported within minutes and apportioning costs between various departments and cost centres takes a fraction of the time it used to.

While Dataflow supports the BHF's existing management reporting system, they have opted for the more powerful Analyzer solution from Dataflow. They are also taking advantage of the integrated fixed asset management system from Assetware (one of a range of packages that integrates seamlessly with Dataflow).

Other changes are also planned, including linking the accounts system to the bank and allowing BHF staff to key in their own purchase orders.

"DATAFLOW HAVE PROVIDED US WITH A SOLUTION THAT ALLOWS US TO DO A LOT MORE TO ENHANCE, SIMPLIFY AND STREAMLINE ACCOUNTING PROCESSES AT THE BHF."

David concludes: "We are only just realising some of the benefits of the Dataflow solution, but I believe in taking things one step at a time. After all, too much excitement isn't good for your heart!"

If you would like further information, please contact us on 0845 456 1020.

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