



Westminster Foundation for Democracy

Global roll-out of Dynamics 365 Business Central for Not for Profit (NFP) organisation

Summary:



Remote global roll-out to 30 offices



Project-based configuration for not for profit finance



Intuitive tools and interface for easy adoption by local teams



Accurate, integrated finance reporting



Fast, controlled purchasing approvals

held in individual spreadsheets, leading to a risk of possible inaccuracies and a lack of real-time management and donor information. It needed a finance management solution with proven capability that was easy for a diverse user group to adopt and use without continuous support.

WFD wanted an off-the-shelf SaaS solution to avoid expensive and high-maintenance custom development. But they also needed specialist reporting and reconciliation features to accommodate not-for-profit project finance protocols. Moving to the Cloud was a core requirement, with the need to roll out seamlessly to more than 30 country offices.

Following an open and competitive tender process, WFD shortlisted several providers and a range of system options. After discussions and demonstrations during a stringent tender process, Xpedition was chosen to deploy and configure Microsoft Dynamics 365 Business Central for all their financial management requirements.

Choosing a finance system in the Cloud was also key to WFD, not least for business continuity planning purposes. Business Central could be deployed across all its international offices from the UK, with ongoing maintenance and updates happening automatically, thus preventing the disruption of costly upgrades. The subscription model insulates the organisation against additional development and management costs, as these are built in as standard.

Xpedition's experience in the charity and Not for Profit sector gave WFD confidence in the selection process.

“Xpedition’s consultants speak our language – for example, they were conversant with our income and expenditure reports and project accounting, rather than the commercial equivalents. We were impressed by their knowledge and track record and their commitment to transparency throughout, with clear and specific time and cost estimates. Even when doubts crept in to our thinking, Xpedition were quick to react, listen and resolve.”

Chris Lane, Director of Operations, Westminster Foundation for Democracy

The Challenge:

NFP project reporting finance out-of-the-box

WFD implemented a programme of technology change to make its core systems, policies, and processes support current and future operational needs, as part of its transformation to a high performing and resilient organisation. The finance system replacement project was one of several change projects implemented as part of this “Building for the Future” agenda designed to save staff time, increase assurance to its donors, and give its employees modern tools to get the job done.

The legacy finance system was more suited to the needs of much smaller and simpler organisations. WFD's operations have grown more extensive and complex over the years, with many more projects to report on and track financially across over 30 offices worldwide. The organisation was previously reliant on finance data and reporting

The Solution:

Proven, scalable, cloud finance solution configured to meet requirements

Microsoft Dynamics 365 Business Central offered WFD key features that were essential for its diverse, international not-for-profit team and project operations. With a familiar Office 365 interface and full integration with standard tools that staff used every day, WFD was confident that users would find the new system relatively intuitive and easy to use.

This was particularly important since its international network has varied staffing levels and diverse IT proficiency. Some offices may have only one or two staff who are not finance or IT specialists. Business Central's familiar and user-friendly design minimised the risk of flawed adoption leading to inaccurate financial recording.



Westminster Foundation for Democracy (WFD) is the UK public body dedicated to supporting democracy around the world. Last year, WFD's 150 staff and partners delivered 81 programmes across 47 countries, working with parliaments, political parties and civil society groups to help make countries' political systems fairer and more inclusive, accountable and transparent.

WFD initiatives include helping to protect women from violence in the Middle East, making politics more inclusive in Africa, consolidating democratic institutions in Asia and building trust in democracy across the Western Balkans.



“Working with Xpedition’s experts, we have discovered and exploited additional - and very valuable - functionality from Business Central. The team has been very flexible in accommodating extra work beyond our original specification. We now have a finance management solution that’s both user-friendly, affordable and customised to meet our needs, without any workarounds or third party add-ons. That’s a huge benefit for an international organisation like ours that’s focused on delivery, not IT.

When we rolled out the system to our over 30 worldwide offices, we sent a link by email: Xpedition had set it up so people could start using it right away. The feedback and uptake have been positive so far and we remain optimistic about the new system’s potential.”

Chris Lane, Director of Operations,
Westminster Foundation for Democracy

The Results: **One powerful system of record for complete visibility and reporting**

Xpedition configured Microsoft Dynamics 365 Business Central to accommodate WFD's project-based financial management requirements. This included timesheets that associate staff activity directly with projects and the capability to track income and expenditure against projects too.

Crucially, grant-funded projects do not make a profit: unit price and unit cost are set up to balance. This gives WFD a clear and accurate audit trail, for regulatory and donor compliance. WFD can also report easily on project finances to meet customer or donor stipulations for individual projects. All of this functionality is within Business Central rather than from a third-party add-on.

Another benefit is a rapid, efficient electronic procurement process. Purchase orders are generated and approved online in Business Central, giving managers complete control and oversight of planned and agreed expenditure.

With a single system of record for project finances and overall organisational finance management, WFD can now generate regular and one-off reports from accurate, trusted and up-to-date information that is all held within Business Central. This allows WFD to benefit from 360 degree visibility of data and a single, digital version of the truth. This also saves time and reduces the possibility of errors from manual data transfer. WFD plans to use Jet Reports to enable improved reporting and analytics.

About Xpedition

With 20 years' experience as a Microsoft Gold Partner and more than 630 Dynamics 365 projects successfully delivered, Xpedition is one of the UK's leading and trusted Microsoft Dynamics 365 implementation partners serving the charity sector.

Our Microsoft certified consultants have deep experience of implementing Dynamics 365 across a range of different charity organisations: helping ambitious organisations reimagine their digital strategies with modern cloud technologies.

To find out more about Xpedition and how Microsoft Dynamics 365 can benefit your organisation, contact one of our experts today.

“There’s a huge benefit to us in the scalability of Business Central. It’s continually supported with investment and development by Microsoft, so will keep pace with evolving technologies and accounting requirements. Because everything is within one system, we don’t have to worry about maintaining integrations. Microsoft warns us if any custom code needs updating and adjusts everything else automatically as they continually enhance the system.”

Joyti Mackintosh, Finance Director,
Westminster Foundation for Democracy

**Fast track your journey
to financial management
success with Xpedition**

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