



A smooth implementation brings financial visibility to charity

Delivering end-to-end finance and reporting for Yorkshire Cancer Research

About the organisation

Since 1925, Yorkshire Cancer Research has been working with researchers, cancer experts, volunteers and supporters to save lives. The charity, which is the largest independent regional cancer charity in England, funds research to improve early diagnosis and discover new and better treatments for people with cancer. The charity has grown over the decades, continues to expand its network of retail stores and now receives over 90,000 individual donations per year. Its annual income of over £15m, made up of donations, grants, investment income and royalties, funds life-saving research into ground-breaking detection and treatment of cancer in Yorkshire and beyond.

The Challenge

Yorkshire Cancer Research has experienced exceptional growth in the past 7 years, with staff numbers increasing from 25-30 to over 90 and a corresponding jump in charitable funding of projects and research. With the added complication of the pandemic, a solution was needed to ensure full remote access to workflows and business intelligence reporting.

Yorkshire Cancer Research is also looking to expand its network of retail outlets from 7 to 40 stores over the next 10 years and the solution would need to fully integrate these operations with Business Central.

“As well as needing to upgrade our IT capabilities to satisfy reporting demand and cope with increased data volumes, we recognised it was time to look at a solution that would grow and develop with us in the future.”

Neil Richardson, Head of Finance at Yorkshire Cancer Research..

The Solution

As a registered charity Yorkshire Cancer Research conducted a rigorous procurement process to identify the best solution to its needs, both in terms of functionality and value for money. Microsoft Dynamics 365

Highlights

Smooth implementation of Microsoft Dynamics 365 Business Central supports end-to-end business processes

Enhanced financial reporting and analytics with Jet Reporting/ Microsoft Power BI

A roadmap of future enhancements, including further integration, CRM and self-service reporting, helps prepare the organisation for expected growth

Cloud solution brings accessibility to all users, from any location, with mobile apps enabling easy and fast processes such as purchase approvals



Business Central was chosen for its fit with Yorkshire Cancer Research's requirements, compatibility with existing Microsoft 365 office applications, the potential to integrate further and customise processes where necessary. Business Central also provided a roadmap for future proofing and further integration.

Microsoft provided a shortlist of potential implementation partners and Xpedition was selected for its expertise with Business Central and its successful involvement with other not-for-profit organisations.

"We were impressed with Xpedition's experience in the sector and, of course its knowledge of Business Central which will help us in the future as we seek to further integrate CRM and expenses management into the solution."

Laura Scott, Commercial Finance Manager, Yorkshire Cancer Research.

To complement Business Central's capabilities for supporting finance operations, Yorkshire Cancer Research selected Jet Reports to provide a flexible and powerful solution for business intelligence reporting and analytics.

Laura continues, **"Our senior management and budget holders are now able to obtain up-to-the-minute financial reports, such as return on investment for specific stores or individual campaigns."**

Yorkshire Cancer Research adopted a 'big bang' approach to implementation,

switching off legacy finance and invoicing systems at year end. Since then, Business Central has been used by around 45 users to support end to end processes such as raising Purchase Requests, making approvals, processing invoices, matching these to POs, bank reconciliations and monthly management accounts.

Laura explains, **"Business Central gives us the ability to easily customise our reporting, with real-time information pulled directly from the single database, so we are planning for budget holders to have self-service abilities, giving them on-demand access to detailed analysis."**

Future plans include integrating CRM with Business Central to automatically feed individual donations directly into Business Central, saving time on data exports and imports from the current legacy system. Expense management and retail stores Point of Sale systems

will also be incorporated into the Business Central solution, completing the business process landscape.

Smooth implementation

With Xpedition's guidance and help, Yorkshire Cancer Research ensured the process and development design was completed before the implementation started. Comprehensive user acceptance testing ironed out almost all the potential issues before go live. As a result the snagging list was minimal and the solution worked from day one.

"I have never seen a finance implementation go so smoothly, which is a testament to Xpedition's diligence and the hard work from all the team at Yorkshire Cancer Research," highlights Neil.

Working with Xpedition

"Xpedition took the time to understand our requirements and helped us to build a solution design that worked for us from the outset."

Neil Richardson, Head of Finance at Yorkshire Cancer Research.

"We felt Xpedition was invested in our success and this was a key factor in the project going so smoothly. We were well supported, and the bottom line is that we replaced our labour-intensive legacy systems on the date we planned, and now have a robust solution that will see Yorkshire Cancer Research into the future."

Laura Scott, Commercial Finance Manager, Yorkshire Cancer Research.



Benefits

End to end processes in a single system

All financial data is now held within a single system, with one login for all business processes, designed specifically for Yorkshire Cancer Research.

Timely and detailed reporting

Business Central now delivers real-time detailed analytics meaning that Yorkshire Cancer Research management can get a real-time picture of return on investment for campaigns or fund-raising events.

Easy customisation of reports

Yorkshire Cancer Research can easily change reports to add more analysis or a different perspective. Users can now customise reports and hit the update button to generate the new results.

Fast implementation

With the benefit of Xpedition's experience with Business Central and its knowledge of the not-for-profit sector, Yorkshire Cancer Research was able to replace two legacy systems for finance and invoicing and switch seamlessly to Business Central.

To learn more about Xpedition visit:

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