



The Outward Bound Trust transforms financial management and funding visibility with Microsoft Dynamics 365 Business Central

About the organisation

Founded in 1941 by the inspirational Kurt Hahn, the Trust expanded from its beginnings at the Aberdovey Sea School to its current collection of six young people centres delivering Outward Bound courses. Over the years it has benefitted over 1.2 million participants, teaching them to believe in themselves. The Trust continues to deliver Kurt Hahn's vision, supported by corporate and private donations and alumni who have participated in its courses.

The Challenge

The Trust had been struggling for some time with outdated legacy systems, cumbersome processes, and limited integration between its finance, sales, and fundraising functions. Duplication of effort and manual processes were undermining its ability to manage the complexities of the charity's financial operations efficiently.

"We recognised the need to modernise our IT landscape, and we had clear requirements beyond standard finance functionality.

We needed a system capable of managing charitable funding and integrating seamlessly with our sales and CRM activities. In line with our Microsoft First strategy, Microsoft Dynamics 365 Business Central was the obvious solution," says Rob Sharpe, Head of Business Systems and Digital Technologies at The Outward Bound Trust.

"Xpedition's experience in the charitable sector was a key factor in selecting them as our implementation partner. But what ultimately made

Highlights

Microsoft Dynamics 365 Business Central, provides a modernised financial landscape, replacing outdated legacy systems and eliminates manual, error prone processes.

Full integration between finance, sales, and fundraising creates end to end visibility, improving financial management, reporting accuracy, and the ability to track charitable funding at a granular level.

Automation and OCR technology have delivered major time savings, including reducing VAT return preparation from a full day to just 20 minutes.

The move to a cloud based platform has simplified upgrades, removed the need for on premise servers, and enabled secure access from any location.

the difference was their 'non salesy' approach, which focused on understanding our organisation and demonstrating their ability to deliver the right solution," Rob continues.

Solution

The Trust has implemented Microsoft Dynamics 365 Business Central to support all aspects of its financial operations. Beyond the standard functionality, the system has been fully integrated with the charity's existing sales and CRM platforms, creating a seamless connection between fundraising, customer engagement, and finance.

“The solution helps manage all the complexities of charitable funding, making it easier to produce separate accounts for each fund, for example, the General Fund and our various Restricted Funds. We can now easily allocate and track expenditure against specific funds,” says Tim Moss, Head of Finance at The Outward Bound Trust.

“Processing invoices used to be a very manual job, with every invoice entered by hand, twice. Now it's more efficient.



The OCR software captures most of the information and learns as it goes,” explains Tim. **“Our old integration was temperamental and required multiple daily downloads. Now it runs automatically every hour, and we don't even notice it.”**

The solution went live in June 2025, and the Trust is already seeing significant benefits. Business processes are more efficient, manual effort has been reduced, and visibility has improved across all areas of financial management. OCR scanning has greatly

streamlined the submission of expenses and the processing of supplier invoices. These were tasks that were previously labour intensive and time consuming.

Reporting has also been enhanced, thanks to the improved quality of data held within the system and the ability to extract information quickly and easily. The organisation now has clearer visibility of funding and expenditure at a granular level, enabling the sales and fundraising teams to monitor performance against targets and giving management the insight needed to make more informed decisions.

Tim adds, **“VAT returns were a particularly challenging activity for a partially exempt organisation, taking a full day to prepare. Now they take 20 minutes, and we have much better visibility of the transactions.”**

Business Central also delivers all the advantages of a cloud based solution, including the retirement of on premise servers and secure access from any location. Upgrades are smoother too, with no need for users to log out during updates. Xpedition continues to support the Trust by managing these regular upgrades.

Benefits

Significant time savings

Manual, inefficient processes have been replaced with automated workflows in Business Central and OCR scanning has streamlined expense submissions and supplier invoice processing. VAT returns that previously took a full day now take around 20 minutes.

Improved financial management

Greater visibility of financial transactions across sales, fundraising, and finance now gives the Trust a clearer picture of where funding comes from and how it is used. The finance team and budget holder can monitor performance more effectively and provide accurate reporting to donors and internal stakeholders.

Reduced manual data entry and fewer errors

Integrated systems eliminate the need for re keying data between sales, fundraising, and finance, resulting in a reduced duplication of effort and lower risk of human error.

Simpler upgrade path

The cloud based solution enables the Trust to easily stay current with Microsoft's latest enhancements. Going forward, updates will be more seamless, with no disruption to users, allowing new features to be adopted more quickly.

Working with Xpedition

“Xpedition was very clear about what we needed to do, and they supported us throughout the process. They provided a clear plan and consistently met their deadlines and delivery targets. They took the time to understand our organisation, building on their expertise in the charitable sector, and delivered a solution that will support us well into the future.”

Rob Sharpe, Head of Business Systems and Digital Technology

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