

# Case Study

## Organisation Snapshot

### Number of iplicit users

8

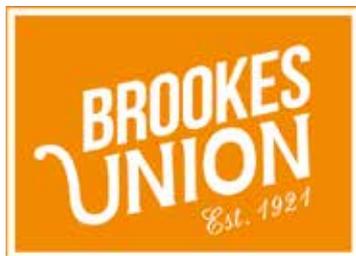
### Previous System

Exchequer

### Go Live

January 2020

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**I can't imagine what would have happened during 'Lockdown' if we hadn't upgraded to iplicit."**



## Brookes Union embraces a true-cloud system

**Helen Bristow, Head of Finance & Resources at Brookes Union discusses her main drivers for change after 18 years using Exchequer.**

### Tell me about Brookes Union?

We are the Students' Union of Oxford Brookes University. We are a registered charity and a member-led organisation existing to support and represent all the students of Oxford Brookes University. At any given time, there are between 16,000 to 18,000 enrolled students who are automatically our members.

### What are the day-to-day demands that are typically placed upon your finance system?

In addition to the registered charity, we also have a trading subsidiary, so our finance system has to run two legal entities.

Things have changed in the last few months, since lockdown, but in general it's the usual demands, such as invoices, purchase ledger and sales, along with reporting and expense management; we have around 100 different Societies at the University and we manage the finances for those too. So although we are one students' union, on the face of it, from a financial management perspective it is much more complicated.

### What led to your decision to change systems?

One of the primary drivers was financial. I had been a user of Exchequer for 18 years and the system was becoming more and more expensive. As we were facing further cuts in funding and that Finance is a much smaller team than 18 years ago, we needed to find a more cost-effective solution that suited us now. But it wasn't just financial; I didn't feel as though I could get the quality of support that I used to experience and it felt like the passion had gone out of the product.

Another primary driver for change was the desire to have a system that didn't mean I had to be locked to my desk to use it! With the old system being server-based, it meant that I couldn't even cover for reception and still be available to answer questions for the finance team. So, choosing a true-cloud system was important to give me the flexibility to work anywhere within the campus and also off-site.

iplicit

I have to admit that we were very lucky with the timing of the **iplicit** implementation. During lockdown, I was locked out of the office and that would have meant that I couldn't have performed my job at all if we were still using a desktop system. With the browser based solution though, it no longer matters at all where I am.

I can't imagine what would have happened during 'Lockdown' if we hadn't upgraded to **iplicit**.

### What was your key criteria for a new system and why did you choose **iplicit** over the other systems being considered?

We are a small team, so our Finance Department is basically me and my colleague. We looked at Xero because it's another true-cloud system and obviously very cost effective, but we felt that it would have been painful and expensive to handle the migration issues, as well as the fact that our operation requires a level of complexity and reporting that was beyond the capabilities of Xero.

Having used my last system for 18 years, I knew that whatever we upgraded to had to be both comprehensive and easy to use. Being well supported and cost effective were also key criteria in selecting a new finance system.

### Since going live with the system, how has your general experience been with both the software and **iplicit** staff?

We did encounter a teething problem associated with the Excel integration as we don't have Office 365 and we're running a slightly older version across the entire campus. Though in the main, I have found **iplicit** very easy to use. In fact, as I use it more and more, I keep being pleasantly surprised at just how flexible it is and how comprehensive the reporting tools can be. It has also been a pleasure to work with the **iplicit** team; not only are they very passionate about the product and keen to help with any challenges we encounter but also they are very open to feedback for system improvement recommendations. I get the impression that they really love the system that they've built and they are keen to keep improving it. As a customer, it is great to know that I can provide feedback and they really do listen.

I am certainly confident that we made the right decision to upgrade to **iplicit** and I know we were very lucky with the timing too.

### From a functionality perspective, what are the major differences with your new system compared to the old one?

I really like the way you can make it your own system, tailored exactly the way you want it to work. For example, in our old system we used Day Books and it's a really traditional way of things. However it becomes really obvious when using **iplicit** that you don't need Day Books at all; all of the information is there when you need it.

It's much easier to create documents with **iplicit** and the team is always there to help with that, whereas our old system could seem clunky in comparison.



### Do you have a favourite feature within **iplicit**?

I really like the Quick Launch facility where you can type anything you like into the box and it finds it for you and opens straight away. It makes everything so easy to access. And also the Help section is excellent; if I have to do something for the first time, I click on the help videos and it makes everything so easy to follow.

### Changing Finance systems can be quite a daunting prospect; having been through the process, what advice would you give other Heads of Finance who are contemplating upgrading their system?

Yes, have a really good think about what you need, not just what you've got already. And don't be afraid to make the leap. I used my old system for a very, very long time and I suppose I was very comfortable with it. However, now having changed the system to **iplicit** there are so many improvements that we now experience.



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**Helen Bristow**  
Head of Finance & Resources  
at Brookes Union

### How did your experience of changing your finance system compare with what you thought would happen?

At the start of the project our expectations regarding project management were set very clearly with the team. And everything was ticked off during the implementation, so it pretty much all went to plan. Obviously, there will always be the odd teething issue when migrating a complex system such as Finance, but it was really good to work with a team that was always so willing to help resolve any issues.

### Anything else you'd like to say?

Outside of the product, I think it's really worth mentioning the technical staff and the support team; there is a real feeling that they care about the success of my implementation and that they are very passionate about the product. There are no 'slopy shoulders' where people don't know the answer or don't want to help. If I need any help, I know it's always there with a good measure of commitment and enthusiasm. Oh, and it's worth mentioning the monthly upgrades that happen automatically; it's great to see new features listed each month!

For further information contact [info@iplicit.com](mailto:info@iplicit.com) or visit [iplicit.com](http://iplicit.com)

[iplicit.com](http://iplicit.com)

t. 020 7729 3260 e. [info@iplicit.com](mailto:info@iplicit.com)

UK: Studio 1 • Floor 2 • 144 Cambridge Heath Road • Bethnal Green • London E1 5QJ  
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