

Nourish Customer Success Story

Lindsay Wilson Jones – Commercial Finance Manager

Tell us about Nourish

So, Nourish Contract Catering is a family-run business. We do school catering. We've got 200 plus sites, mainly primary education, but some secondary. We've been going for 20 years with our owner Annette Ryan-Murphy at the head, and our Managing Director Mark Hammond leads day-to-day operations.

So, my role at Nourish is I'm the Commercial Finance Manager, preparing the finances each month, monthly performances, how we can get sites performing better, maintaining brilliant GPs, and converting that to a good positive position.

Tell us about why you decided to make the shift to Sage Intacct

We decided to make a change to using Sage Intacct because the software we were using was nearing the end of its capacity for us as a business. As we're growing, we need software that will grow with us. Sage Intacct is an interactive piece of software, and we just really loved it from the moment we first were introduced to it.

Tell us about some of the challenges you experienced before moving to Sage Intacct

So challenges we faced before moving to Sage Intacct was the system we were using, the server-base was quite clunky, quite slow. Running reports would take an age and sometimes completely fail, so we knew we needed a piece of software that was much more up to date, user friendly and usable.

Tell us about the software you were using before Sage Intacct

So before we made the move to Sage Intacct, we were using Sage 50, a very good system for a smaller business. It would absolutely give us what we needed when we were under 100 sites, a much smaller business. But it became very slow, very clunky, not performing as we needed it to, to give us accurate information.

Tell us about how your reporting has changed since the move to Sage Intacct

So since the move to Sage Intacct, our reporting has changed in a way that we can now build specific reports for our requirements rather than the out-the-of-the-box reports that we had with Sage 50. We have a much more varied range of reports, and some specific items that reports have been run that might be our business specific, as opposed to a standard P&L. We have different definitions, different parameters that the reports are now covering.

What excited you when you first saw Sage Intacct?

So, what excited me first when I first saw the Sage Intacct introduction for me was the reporting capabilities and the dashboards. For me, the reporting that we can pull out of Sage Intacct is amazing compared to the manual spreadsheets I was having to create, literally retyping data from a Sage 50 export into a spreadsheet. We had one for every site we had, and it would take me days. And now, at the click of a button, Sage Intacct just goes ta-da!

What has improved since moving to Sage Intacct?

So the amount of time I've saved in reporting since the move to Sage Intacct has been immense. Sometimes recreating report information manually from Sage 50 would take me days, whereas now I'm literally clicking a button in Sage Intacct, and it's giving me the reporting I need.

So, areas that we've absolutely found improvements on with the move to Sage Intacct has been just accuracy. So, with Sage 50, inputting errors would happen because it would want to pre-populate a field for you, whereas with Sage Intacct you type and see it much clearer. In Sage 50, it would be a number, whereas in Sage Intacct, it's a number and a name. It's much easier to notice those inaccuracies at inputting point as opposed to somebody like me who's checking the data, then having to change it.

How has your month-end changed since your move to Sage Intacct?

Month-end has changed since the move to Sage Intacct. It is much speedier, much easier. Where we would be manually importing a lot of information into Sage 50, we don't need to do that anymore. The bank feed and the bank rec is life changing. It's so quick. It's so easy. It's very intuitive. All of those things just make month-end, and with the speed of the reporting as well, instant. And with the dashboard as well, as I said, our MD Mark Hammond can see results immediately because it's a real time system. He's not waiting for us to input information that we've been doing as the month has gone on, he can see where we are. It has made everything honestly so much speedier.

We have financial performance review meetings with the operations team, just so as we can keep them up to speed with their performance for their sites and things like that, and again, that's much quicker now from their point of view that they can see their results on their dashboards if they need to, or in the meetings we are able to produce the information for those meetings much quicker. So, whereas those used to be the third week of the month, we've now brought them forward to the second week of the month. Still gives us the time to check the data, just because obviously human error occurs, but it means that they get that information quicker. So, if they do need to make any changes or implement any improvements in their site, they have that information much quicker.

Tell us about how your organisation is using dashboards in Sage Intacct

So, within the organisation, our team use their dashboard to be able to monitor their performance at each month-end, but also to see their own sites, sort of age debt and information like that. Our MD Mark Hammond also uses a dashboard to monitor the whole company's performance, but also, he then knows the areas that he needs to focus on from a strategic point of view. Dashboards have changed the way in which the team respond to the information they're given because there it's right in front of them as soon as they log in, as opposed to waiting for information to be provided by the finance team to give them the answers to their questions. They're able to go and see that information for themselves. The team do use the dashboards in real time, as opposed to waiting for month end. Because previously, using Sage 50, I'd have to produce a manual Excel workbook to give them the information that they would require, whereas now they're able to view that themselves.

What surprised you in terms of functionality within Sage Intacct?

So, within the functionalities within Intacct, the biggest area of surprise for me was that we could have sort of specific items added that we could report on. So, for us, a big part of our business is the number of meals that the school provides. Whereas before that, we used to have to have a manual spreadsheet

that told us this. Whereas our lovely itas consultants built into our Sage Intacct account, so every time a meal number is entered, it counts that data for us, and we can report on it, as opposed to me having to look at every invoice produced and type it into a spreadsheet.

Tell us about the improvements you've seen since the shift to Sage Intacct

So another good improvement for us in when we are producing the invoicing is the recurring transaction template that we set. So, at the start of the academic year, we set up the templates for the invoicing, and we've set that up as a recurring item. And then the lovely team in the office simply inputs the number of meals and press post, and they get emailed out. It's so quick. I mean, the amount of time that Sage Intacct has saved us is unquestionable. It's really, really saved a lot of time.

How did you find the shift to the cloud from a server-based software?

So, the move from Sage 50 in premise to Sage Intacct on the cloud, the biggest improvement that we noticed was the speed in the service, and the fact that we don't have to connect securely via remote system for people that work at home. It's all secure because it's web based. It's just accessible. 24/7, and if there are any server issues, it doesn't knock us. It doesn't stop us from being able to work.

Tell us about your experience implementing Sage Intacct

So originally, when we decided to implement Sage Intacct, we had a previous partner supporting us. Unfortunately, that didn't really work out, so we made a switch to itas as our partner, and we needed the implementation too to happen in a short number of weeks. I think it was between six and eight weeks, and itas was amazing. The team that helped us with the initial implementation, the support from the itas support team, the itas project team, and the ongoing support since we've gone live has been phenomenal. Everybody is just at the end of an email, the end of a phone, and the response times are so good.

So, one of the real key benefits we had with itas being our partner is the fact that they are UK-based, and so we're working in the same time zone, and we we're using the same terminology as well, because that was a big thing for us. It's sort of the whole tax or that conversation. Having a UK-based company like itas was a real tick in the box for us second time round.

Tell us about the process the itas team took you through

So the process the itas team took us through was simple, and there was somebody supporting us the entire time. We were given clear guidance, clear deadlines, and somebody that, if we weren't sure, like the daily calls sometimes, that really supported us as a new customer. Yeah, good.

Tell us about the Go Live process

So, the go live process for Sage Intacct, because the turnaround for us was really short. It kind of just every stage kept happening, and then on go live day we were live, and it was it was so smooth, wasn't so it sometimes making that switch and being live can be really, really scary sometimes because you're using a whole new system and which is the core of your business and the fact that it was seamless and you didn't really even notice that we were live and it was all going has been it's been really good to follow and go live. The support from the itas team is second to none. They are literally the end of a telephone line or the end of an email. They're a lovely, friendly team, and sometimes if an email response isn't clear enough for us because to us it's new. If there's a problem, it's something we haven't

come up against before. They're more than happy to jump on a Teams call, talk us through it, show us how to do it, as well as providing us with really detailed guidance in the email response. So far we've not come across anything that the support team hasn't been able to help us sort out for ourselves. So, honestly, the support, yeah they're a great team, the support team, and so knowledgeable. So, since we went live with Sage Intacct, we've had one update to the system, which was just before Christmas, and our customer success manager had a call with me, talked to me through all of the updates, the upgrades to the system. There's also been a webinar on it as well, which has been great, just to understand the changes that are coming, we're really excited about some of the changes that are coming. I think they're going to help us again, no end. Just to automate a lot of the processes and a lot of the things that we do. Yeah, our customer success manager is I. She's amazing. She's always there to fully update us on everything, all changes, and also if I've got any questions, she's my go-to person.

What support did the itas team give you with reporting?

So, with the reporting, the IT the itas team support, we went. We had report training, or I had report training for a half-day session, just to go through the reports that we had, but also those unique reports that we wanted to write for ourselves, and just having the capability. To be able to write a report if we need it, but knowing that the support is there, if I write a report and it's not right, then the support team are always at the end of an email to tell me what I'm doing. So, the report writer within Sage Intacct is very interesting. intuitive to use, but you certainly need that initial guidance because when you look at it without help, I do think it's a little bit mind-boggling. But once somebody who understands it far better than I did when I first looked at it, went through it with me, and again, it was my itas project partner who was phenomenal, and he simply just went through it with me step by step. We recorded the session, so I've always got to look back on it, and it has been a real key benefit to us being able to write those reports.

How did you find the Project Management team at itas?

The Project Management team within itas that we worked with were completely knowledgeable in Sage Intacct, and we did have a few little bits that were specific to us as a company, and they really worked with us daily during the implementation stage, just to iron out any quirks that we found or things that weren't quite doing what we needed them to do. And they were just amazing and so knowledgeable for something that was so new to me. They, yeah, they really know their stuff.

Tell us about the support you had from the itas team?

My biggest concern making the move from Sage 50 to Sage Intacct was that we wouldn't be able to produce the data in the same format that everyone was used to seeing, and that I wouldn't be able to find the information. So, in Sage 50, you know where to look. Whereas with a new system, I was really worried that somebody would say to me, "Well, I'd like an answer on this, please, and I wouldn't know where to look. But through all the training we had, also Sage Intacct is quite intuitive anyway. So, if we needed to look, if you needed to look for something, there's the help guidance within Sage Intacct, but also the itas support team. You can ask the simplest of questions, and it's never a problem. It's never too, it's never too small a problem. So, it's been really comforting because they're the sorts of worries you have as somebody that is often asked for information does not know where to find that information in a new system. But with all the support we had during implementation and go live, and since go live, yeah, I didn't need to worry. The itas team across the board are the most knowledgeable, passionate

people. Every time I have a question, they seem to answer it. Be it on a webinar, be it during a support call, they seem to answer the question before I have a chance to ask it. And if they don't know, they will go away, find out, and come back. And that's really important for us because sometimes if people don't get back to you, it can be really frustrating. But the itas team always, always comes back, and they always know the answer.

Why should organisations shift to Sage Intacct?

So, organisations should shift to Sage Intacct if they want to save time, if they want clear, accurate data, really good reporting, and a system that's really intuitive and clear, easy information.

Why should organisations choose itas as their partner?

Organisations should choose itas as their partner because, from my experience, itas have been amazing. They helped us when we were in a really sticky situation, and they have been more than supportive. They're friendly and so knowledgeable.

What impact has shifting to Sage Intacct had on your organisation?

The impact with shifting to Sage Intacct for our organisation has meant that we are able to provide information to our operators that have an impact on our business in real time, straight away, as opposed to waiting for manual information to be collated and sent out. I think our wider organisation. I think Sage Intacct is actually really good. I think they were sceptical about starting because it was something new to them. They'd never had access to Sage 50 previously, but now I think they find it amazing because, as I say, the information is there staring them in the face.

Tell us why you would recommend Sage Intacct

I'd recommend Sage Intacct because the system is really intuitive. It's very speedy. It's a real upgrade from Sage 50. The system gives us real-time information at the click of a button, as opposed to having to run ripples.

What are your next steps with Sage Intacct?

Our next steps with Sage Intacct, the bits that I'm really excited for, is the automated AP functionality that is coming soon. So, as I'm told, I'm very excited about that, but also being able to expand our reporting as we as we get more information in Sage Intacct, and we've got the history there, then we'll be able to expand on our reporting and develop other areas of reporting that will also assist the wider company.

Would you recommend itas as a partner?

I'd recommend itas as a partner because they're very knowledgeable. People are just amazing people. They know their stuff, and they're so supportive and more than happy to help. From the moment that we were introduced to itas, nothing has been too much trouble. Whatever we've asked for, whatever development during implementation has been required, nothing has been a problem, and that's what I've really loved. Even if we had to work on something together, and itas couldn't give us just give us the answer. It had to be talked through. It was a real partnership, and I loved that from the moment that we were introduced to itas.