



Rebuilding  
lives after  
sight loss

## BLIND VETERANS UK

# Blind Veterans sees savings of up to 50% with time saved on budgeting, forecasting, reporting & consolidation with Workday Adaptive Planning

[blindveterans.org.uk](http://blindveterans.org.uk)

**FOUNDED**  
1915

**INDUSTRY**  
Charity

**KEY INTEGRATIONS**  
Access Dimensions

Blind Veterans was founded in 1915 to help soldiers blinded during the First World War. Today they offer lifelong support to Armed Forces and National Service veterans – no matter what the cause of their sight loss and regardless of how long they served. They help blind and vision-impaired ex-Service personnel rebuild their lives after sight loss”.



“Workday Adaptive Planning allows us to be agile and reforecast quickly, which is very important to staff whose main priority is the service they provide to our members”.

**Nupur Patel**  
Head of Finance, Blind Veterans

# The Challenges

Fast forward over one hundred years, and things have got a lot more complicated with the services they provide.

Blind Veterans has two centres, one in Llandudno and one in Brighton, providing nursing care, respite, training and other activities. To enable veterans to access support locally, they also have nineteen communities set up across five regions (separated into over ninety cost centres). They have over five hundred staff and double that in volunteers. Rehabilitation and training are the primary services they provide to ensure the veterans can have a good quality of life and live independently.

“We were using Excel to do our main budgeting and forecasting. We had our finance software, but that wasn’t doing what we needed it to do. We managed to get by using Excel, but it was very clunky, especially as a shared workbook with over ninety budget holders from the different cost centres trying to access it simultaneously. You run the risk of unwanted changes to formats and formulas, making consolidation complicated and time-consuming. You can imagine the time that went into creating the spreadsheet and consolidating it manually, and this had to be done four to five times a year with quarterly forecasting. Then you have confidential information that had to be managed separately. It ended up creating more work than it saved us.” says **Nupur Patel. Head of Finance at Blind Veterans.**

## Pivoting quickly and shortening the time to budget

Blind Veterans decided it was time to look for an alternative and had a specific set of must-haves for the new software.

“The user interface was important to us because many of our budget holders aren’t financially savvy. So they needed something they could understand, and that had a simple interface. We also wanted something integrated with our finance and HR systems (Access Dimensions and Core HR). Something flexible because we have multiple income streams; we have the centre income, donations from the public, and events and campaigns, and we have legacies. We also set up a research facility a few years ago, we have investments managed by external investment managers and our own property portfolio, so our income is quite diverse”.





**The system is excellent and the most usable one I have seen. The dashboards and flexibility in reports and how information can be shown are excellent as the system can delve into the cost centres. It will really help us to monitor how we are performing” says Paul Lawless.**



The solution had to be something that could deal with all these different income streams, fundraising and events; for example, we wanted to be able to manage budgets by projects and not just by expense codes for a particular cost centre, but also allow us to be able to do analysis on both at the cost centre or directorate level as well as at a whole organisations level,” says Nupur.

“Over the years, we’ve been through a few transitions and made changes to the organisation’s structure; it would have been useful to have a tool (other than Excel) to be able to do some long-term scenario and personnel planning”.

“We wanted something that would replicate Excel, but without the clunkiness. Without it crashing when five or more people wanted to get into the same spreadsheet. We wanted the new software to be able to consolidate quickly at the press of a button and have different levels of security and access built in”.



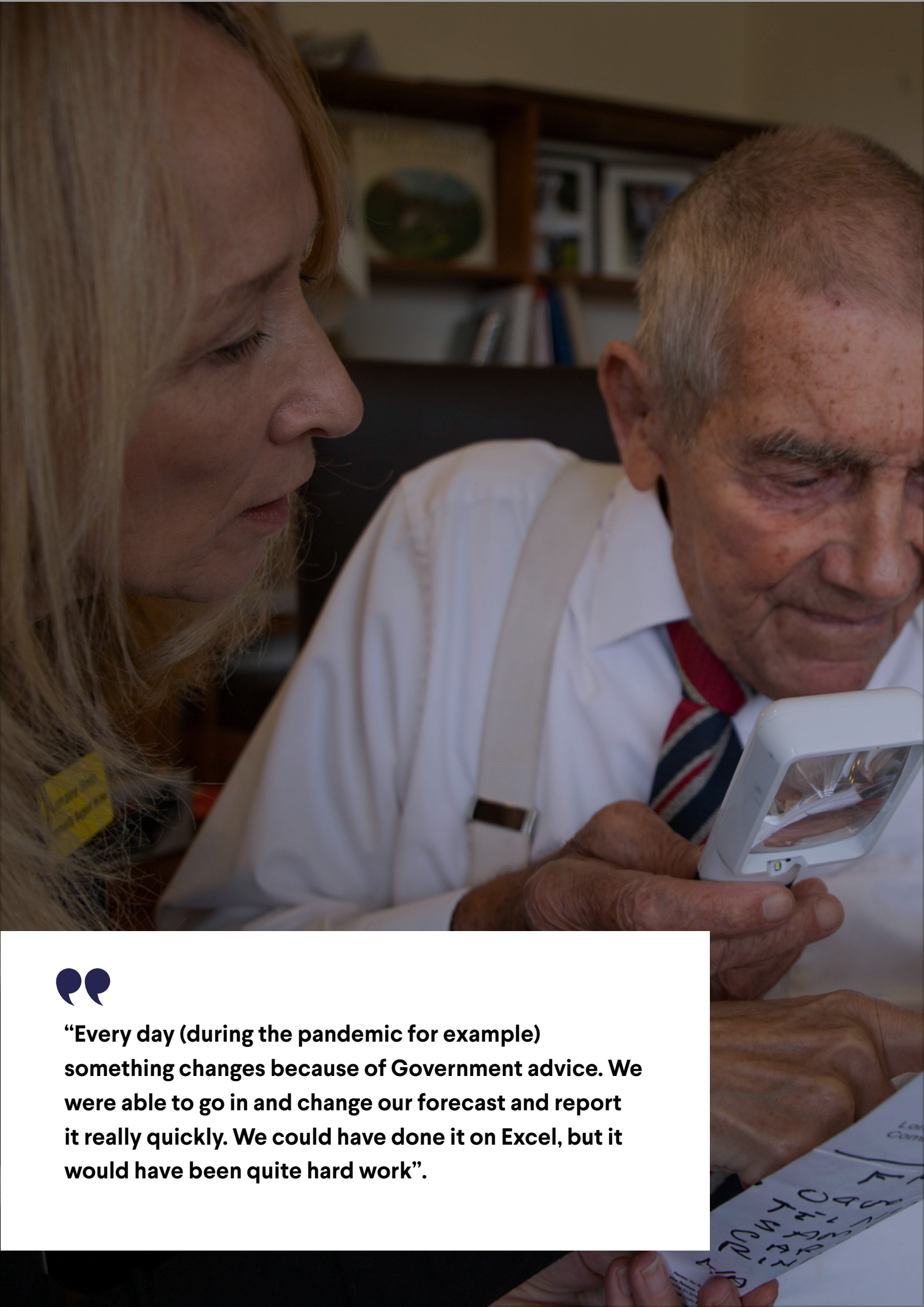
**“Over the years, we’ve been through a few transitions and made changes to the organisation’s structure; it would have been useful to have a tool (other than Excel) to be able to do some long-term scenario and personnel planning”.**

**Nupur Patel**  
Head of Finance

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“Workday Adaptive Planning allowed us to be agile and budget and reforecast quickly, which is very important when this is not the main priority for the Staff (budget holders) who are either at the front line trying to provide a service to our members to allow them to live an independent life or staff who are trying to raise funds so that Blind Veterans can continue to provide this service”. Says Nupur.





**“Every day (during the pandemic for example) something changes because of Government advice. We were able to go in and change our forecast and report it really quickly. We could have done it on Excel, but it would have been quite hard work”.**

# How Formulate Helped

Richard Morgan and Chris Holbrook, who are consultants at Formulate, visited Blind Veterans to find out more and understand their business, what they needed to achieve and set out a plan.

“Richard set out a really clear plan for each module and set out a timeline for implementation, and how long he would give us for user testing and training whilst being considerate about allowing us the time to carry out our business as usual activity and work around holidays”.

“He did the backend work for us; although he did this remotely, we were in constant contact with weekly update calls to keep us informed and on track; he was just amazing. Richard understood everything we were trying to do and was patient and understanding when we took longer than necessary to do the testing and give feedback or when we made last minute changes. Whilst Richard was setting up the system per our specification (over the first few months of the project), we were tasked with completing some online self-training (provided by Workday Adaptive Planning), which was time-consuming but very helpful as it had step by step instructions with a demo company to practice on – we still refer to it now, but don’t underestimate the time this takes. You need to double Workday Adaptive Planning’s estimate on how long the training takes,” says Nupur.

“A few of the stakeholders weren’t sure about the change at first as they were used to the old Excel process as this was simple for them to use. However, managers could now see three or four different cost centres that came under them, plan their personnel, compare to previous years or different versions (forecasts), track budget holders progress, send their approval or comments to budget holders, and save comments for future reference. When they saw all these functionalities that Workday Adaptive Planning had over the plain Excel spreadsheet, it won them over”.



**“When they saw the functionality Workday Adaptive Planning had rather than a plain Excel spreadsheet; we won them over”.**

**Nupur Patel**  
Head of Finance

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# Benefits & Outcomes

“Faster budget and forecasting with fewer errors! Especially during the pandemic, when so much was in flux and uncertain, we were able to move towards being more flexible, with rolling budgets quickly, that is so much easier using Workday Adaptive Planning, I can't imagine how that would have been if we had to do it in Excel,” says Nupur.

“I think the system is excellent and the most usable one I have seen. The dashboards and flexibility in reports and how information can be shown are excellent as the system can delve into the cost centres. The tools which were demonstrated to us are excellent and will really help us to monitor how we are performing,” says **Paul Lawless, Assistant Director of Fundraising**.

- Increased productivity by 20%
- Saved time on budgeting & consolidating or time savings in general - 50%
- Ability to update forecasts and report quickly
- Fewer errors
- Increased functionality & clear, simple user-interface
- Workday Adaptive Planning integrates with Access Dimensions
- Better security with the ability to give different access levels
- Ability to extract and design bespoke reports to individual manager needs
- Ability to do some cashflow planning without additional input

“Workday Adaptive Planning has proven to be incredibly helpful with our budgeting and forecasting process. Budget holders have welcomed a very intuitive interface, and finance has benefited from having a tool that allows us to pull information together efficiently with the availability for additional analysis.”

“The reporting tools have allowed us to replicate our management reports very easily, but with much less user input going forward. Being able to manipulate and dissect data in lots of different ways, incredibly quickly has been invaluable.” Says **Claire Annett-Davids, Business Accountant at Blind Veterans UK**.



“Workday Adaptive Planning has proved to be a handy tool in facilitating variance analysis conversations with budget holders during the COVID pandemic. Budget holders and Finance Business Partners have been able to very easily compare financial results against different time periods, budgets and forecasts to aid discussions on trends and assumptions while sharing a screen. Previously these conversations involved various Excel spreadsheets that were far more difficult to manipulate during a meeting to answer a specific question quickly or make a relevant point”.

“With bespoke reports being set up using Office Connect, management information has been so much quicker to provide to budget holders. Also, having standard Office Connect templates prepared saves time should the same information be needed for a different department or subsequent months. Saving time on set up gives the finance team more time to concentrate on analysis”, says **Lisa Hollick, Senior Financial Analyst and Business Partner at Blind Veterans UK.**

## The Future

“We are planning to expand our use of Workday Adaptive Planning by taking advantage of the scenario planning ability. It was always part of the original plan to integrate it with the payroll system, so eventually, we will relook at doing this. As we upskill managers, they will also be able to extract the information they need from the system directly, which will help them plan and make decisions in a more timely and efficient way”.

“We are happy we chose Formulate as our partner; Richard was brilliant and very patient; he understood all the complications and everything we were trying to achieve”.

“Workday Adaptive Planning is the tool of choice used by Blind Veterans finance team and managers. It helps us bring our core values to life every day by freeing up staff time so that they can provide high-quality support to blind veterans as and when they need it, to help them



# About Formulate

Formulate - A Kainos company is part of the Kainos Workday practice, the largest partner for Workday in Europe. We help organisations across ninety-six countries, safeguard their tenants' functionality and security.

Our team consists of consultants and solution architects whose backgrounds are diverse. We all have a deep understanding of planning and systems. Some of us have worked at the coal face as finance managers, others have crossed the line from accounting to systems. All have 'real world' commercial experience.

Getting your accounting structures and processes right is critical in our book. Our holy grail starts with a perfectly balanced P&L, balance sheet and cash flow. Using our integrated forecast plan, we can then adapt that to your business.

We admit to having some geek in our DNA because it isn't just your planning system we need to understand. These days, connecting data from general ledgers in ERP's and other accounting systems means a good understanding of integration.

- We are part of Kainos Global Workday Adaptive Planning practice with unrivalled expertise and scale.
- We are the most extensive Workday Adaptive Planning partner globally.
- We are a Platinum Solutions Provider.
- Formulate were Global Solutions Provider of the year FY20 and Solutions Provider of the year FY20.
- We have the largest global consultancy team.
- We have over 700 successful implementations globally.
- We have a dedicated team of integration specialists who create a unified Workday Planning Environment.



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a kainos® company

