

MILESTONES TRUST

Milestones Trust Speeds Up Budgeting With Workday Adaptive Planning

milestonetrust.org.uk

FOUNDED
1987

INDUSTRY
Charity

KEY INTEGRATIONS
Office Connect, Sun

Milestones Trust is thirty-four years old. Today, they support five hundred and fifty people with mental health, learning disabilities, dementia and complex behavioural needs. More than ever, people in society need the services they offer to bring about positive change in their lives.

Their budgeting process was incredibly time consuming and complicated. When Hilary Pearce joined the Milestones Trust three years ago as Director of Finance, she recognised they needed an intuitive, adaptable tool that encouraged their team to collaborate quicker on their budgets. That's where Formulate comes in.



“It was vital to see it working before we committed. It worked, and Sarah came to me and said: “This is the system for us”. And to be honest, from the various systems we saw, Workday Adaptive Planning was the only one that could work”.

Hilary Pearce

The Challenges

Sarah Barker, the Management Accountant responsible for leading on the budgets, was desperate for some software to help with the budgeting.

Sarah had been managing budgets on hundreds of spreadsheets. Budgeting was time consuming, complicated and labour intensive.

“You always get mistakes and errors with spreadsheets, and things don’t link through properly. It was just very labour intensive. It is easy to make a mistake on Excel, and then not finding the error and having it cause an issue a few months down the line because you didn’t find it” says Hilary.

“In my first year, we ran out of time to plan it properly, but in my second year I said yes, let’s look for a system”.

Putting The Power Back In The Hands of The Finance Team

Sarah and Hilary were clear in what they wanted of the new financial planning software. It had to be simple, flexible, save time and easily manage multiple cost centres.

“We run forty plus care homes and at least forty sites for assisted living, so we have many cost centres. We needed something that would deal with these individual cost centres very straightforwardly. We had to be able to group them in a hierarchy because we have a divisional structure”.

“We have learning disabilities, mental health and dementia services, so that was very important to us,” said Hilary.

“There are two specific things that are unique to the social care sector: the way the funding and income works and the way our staffing works. We needed something that would work with that”.



I'd say the reporting has been brilliant. It's easy to make changes and to adapt things when needed. It just feels more manageable. It felt a little bit out of control when it was all of those spreadsheets. Now it doesn't feel like that. We are in control of the process.

How Formulate Helped

“The excellent thing about the team at Formulate is that they came along and demonstrated how it would work for us. We worked with Susanne; she was excellent; she knows her stuff. Susanne was great at understanding our needs and made an effort to understand what we wanted to achieve”.

Formulate took an example of how we currently worked and showed us on the screen how we could build that ourselves in the products. They took the time to prove the concepts to us, other software suppliers did not! Formulate also had another customer who had integrated Workday Adaptive Planning with Sun, that was a requirement of ours as we use Sun for our financial systems”.

“Once we’d convinced our financial accountant that side of it worked too, we had everybody on board”.

“The funding we have can be quite tricky because a person that we support might have multiple funding streams. In terms of the staffing, we have to look at the number of hours that we are providing and we have various grades of staff. Workday Adaptive Planning is very flexible in building sheets that handled how we manage the income and the staffing budgets. It was vital for Sarah to see those working before we committed. It worked, and Sarah came to me and said: “This is the system for us”. And to be honest, from the various systems we saw, Workday Adaptive Planning was the only one that could work”.



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Hilary Pearce

“The implementation ran alongside our budget process. Susanne, our Formulate consultant, was so helpful. Susanne would set it up and then ask us to play around, test it and when Sarah was happy with it, that bit went live. We then started to populate that with the true budget. We started in September, and the whole process probably took us through until the end of January, then we had our first draft budget. It was what we wanted”.

Problem Solving In Real-Time

“I’d say the reporting has been brilliant. Sarah finds it easy to make changes and to adapt things when needed. For me, I can dip in and out. I can review and ask questions as we are going along through the process. I think the individual budget managers like being able to see their information while having their meeting instead of being told: “oh we’ll send it to you afterwards once we’ve worked it out”.

“The staffing side is more straightforward now. It just feels more manageable. It felt a little bit out of control when it was all of those spreadsheets, and it felt like we weren’t in control of the process. Now it doesn’t feel like that. We are in control of the process, and it feels like Workday Adaptive Planning helps us rather than hinders us”.



When we all began working from home, it was effortless to work remotely as it is cloud-based. We've been able to have Zoom meetings with managers, show them all the latest information and talk them through it as we go. It is so much easier doing that than with a bunch of spreadsheets!

Benefits To Milestones Trust

- Enhanced business reporting
- Instantly able to share and view budgets with key stakeholders
- Ability to work anywhere with an internet connection as Workday Adaptive Planning is cloud-based.
- Improved business processes and efficiency
- Since adopting it now takes 15% less time to complete our budgets

How It Helped Through the Pandemic

COVID hit in March 2020, and the Milestone Trust had just finished their budget, it was their first year of using Workday Adaptive Planning. “When we all began working from home, it was effortless for Sarah to work remotely as Workday Adaptive Planning is cloud-based. She was also able to work on the reporting side of things using Office Connect. We’re now coming into the new budget cycle, and Sarah has been able to have Zoom meetings with managers, show them all the latest information and talk them through it as we go. It is so much easier doing that than with a bunch of spreadsheets!”.

The Future

“There is so much more we can do with it. It has been our first full calendar year with it, so next year we will start to explore more, things like forecasting and what-if scenarios will come into their own next year”.

“I get the sense that everybody at Formulate knows their stuff. You always get a positive response. Everything we wanted to do, we’ve been able to which has been great”.



About Formulate

Formulate - A Kainos company is part of the Kainos Workday practise, 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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