

## Success Story

# Sage Intacct delivers huge efficiencies for ERS Medical

Transporting the company's data management into the 21st century



ERS Medical provides health and social care transport services to the NHS and wider healthcare sector across the UK.

Completing over 700,000 patient journeys and transporting over 10 million pathology samples a year, ERS Medical owns a comprehensive fleet of more than 500 vehicles and employs over 1200 staff — including Ambulance Care Assistants, Mental Health Care Assistants and Medical Courier drivers. Delivering a nationwide flexible 24-7 365-day transport service, ERS Medical serves more than 250 NHS Trusts and Integrated Care Systems, and handles approximately 300,000 calls each year.

### Key outcomes

- Capacity to manage large data loads with ease, then slice and dice it
- Report producing time cut from 15 minutes per report to seconds
- Ability to produce live snapshot of data for instant board reports
- Dashboard creation cut from four months to one day
- Instant insight into critical data such as Days Sales Outstanding
- AP run cut from four days to four hours, per month

**Company**  
ERS Medical

**Location**  
United Kingdom

**Industry**  
Logistics & Transportation

**Sage Products**  
Sage Intacct



**ERS Medical**

### About ERS Medical

ERS Medical provides health and social care transport services to the NHS and wider healthcare sector across the UK.

**Sage**



### **Rapid growth**

Since forming its own independent company, ERS Medical has rapidly grown from £25m turnover in 2018 to £33m turnover in 2020, an increase of 32%.

The speed of this success meant that ERS Medical was starting to outgrow its existing Sage accounting solution, Sage Financials, which was designed for smaller businesses. With the company growing further still, ERS Medical's volume of data was becoming problematic; the existing solution was unable to process such large amounts of data and present it in ways the business needed.

“For example, the accounts team would generate a report at the beginning of the year, but when the business opened a new site, they would be unable to go back and amend the report to include its data,” explains Katherine Lees, Finance Controller at ERS Medical.

The business realised it needed a more advanced cloud-based solution that could not only manage the challenges associated with rapid growth, but also unlock and retain more efficiency within core accounting processes.

### **Transitioning to Sage Intacct**

The ERS Medical team identified reporting as a key enabler of their future success. A new accounting solution needed to ensure that producing, amending and utilising reports would be as fast and simple as possible. It also needed to not only meet the needs of the business today, but be robust enough to handle increased complexity as more customer contracts were won and new sites opened.

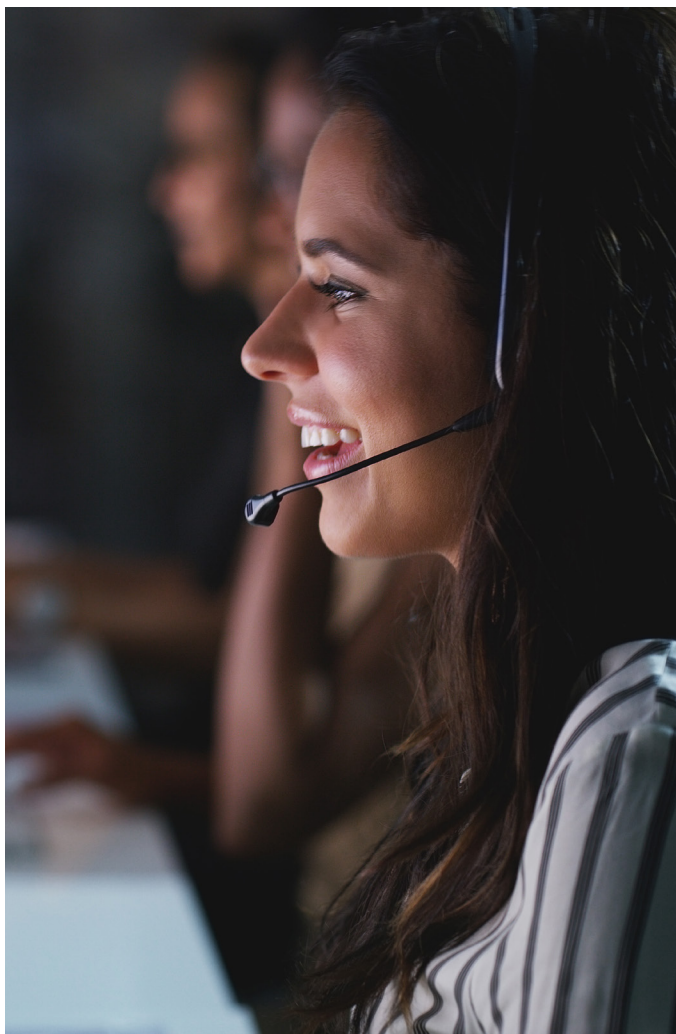
“We were happy with Sage as a partner, and we decided to implement Sage Intacct due to its ability to unlock efficiency, and scale with the business in the long-term,” adds Katherine.

### **Insights faster than ever**

With more reporting options, increased customisation and the processing power to manage high volumes of data, the team are now able to quickly and easily update reports and present information however they need to. An example of this is contract profitability reports, which allow ERS to analyse the Income Statement of specific customer contracts and gain a better understanding of their performances.

Sage Intacct's intuitive user experience also makes running such reports much faster and easier, enabling the accounts team to access real-time data and valuable insights in seconds.

“Running a report on our previous system would usually take around 15 minutes, but now we can do it in literally seconds. It saves us so much time and we can get the real-time insights we need much faster,” says Katherine.



ERS Medical can now use Sage Intacct's dashboards to make data-driven decisions.

### **Real-time performance at a glance**

With the reporting process streamlined, ERS Medical began using Sage Intacct to inform key decisions across the business using custom dashboards. They are able to visualise the reports they have produced in multiple ways; from graphs and charts to figures and statistics.

"I love the fact that you can customise the dashboards within Intacct to make it visually user friendly for different audience types. For instance, our leadership team can view a snapshot of how the business is performing," explains Katherine.

Before Sage Intacct, ERS Medical found that creating these types of dashboard could take up to four months.

"Creating dashboards used to take so long that we actually outsourced a partner to do it for us. Now we can do it ourselves in less than a day. We can quickly present our leadership team with vital performance information such as revenue for the year and gross margin percentages," adds Katherine.

### **Sharing data-driven recommendations**

As well as keeping the leadership team informed, ERS Medical also use Sage Intacct's dashboards to improve performance of individual sites. The ability to drill down into site specific detail enables the team to provide data-driven recommendations.

"Once a month, we have a call with each site to discuss performance. With Sage Intacct's dashboards, we can have snapshots such as profit and loss up on the screen in seconds," explains Katherine.

This performance data can be compared to business targets, allowing the team to identify areas for improvement, such as reducing days sales outstanding by focusing on cash collection for particular customers.

A site can also be examined for potential efficiency gains, around labour for example. "It makes it really easy to compare a multi site business where each site has its own Income Statement. At a glance you can compare them to benchmark metrics such as labour spend percentages, find issues and compare best practice. This in turn leads to excellent business partnering with operational teams to ensure they understand where to focus their cost control efforts," says Katherine.

### **Unlocking efficiencies through automation**

When asked about the impact of Sage Intacct on their core accounting processes, Katherine spoke of the significant time savings the team has experienced, largely through built-in automation of the software. "We've managed to cut the accounts payable run from four days per month to four hours, not to mention being able to create an annual budget in only half a day," Katherine adds.

Katherine says it's now "so easy" to pull all the information together for the payment runs using Intacct. "You literally run the reports to see what's on there; you choose who you want to pay; allocate it for a team member to review; you pay it and it produces a CSV file for the bank; you process it to the bank, and it's done," says Katherine.



“All of these time savings quickly add up, and now we’re working far more efficiently, but I know there is more we are going to get out of Sage Intacct.”

**Katherine Lees**

Finance Controller, ERS Medical

**The smart choice**

Katherine now has confidence in her budgets, and can forecast using new contracts coming in, slice the data and include in the budgets. Not only that, but generating the budget is yet another huge time saving. “We used to have to import our budgets every single month which took half a day every month. Using Sage Intacct, I have spent less than half a day getting the whole year’s budgets in this time,” Katherine adds.

The business also has complicated accruals which meant that accounts payable end-to-end would take the team a week on Sage Financials, and now only takes three days.

It’s clear that transitioning to Sage Intacct was not just the smart move, but the right move, and Katherine anticipates even further efficiency and productivity savings.

Katherine adds that they have only scratched the surface with regards to efficiencies. “All of these time savings quickly add up, and now we’re working far more efficiently, but I know there is more we are going to get out of Sage Intacct,” concludes Katherine.



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