

## Success Story

# Osprey Shipping sets sail for success with Sage

Sage Intacct Planning helps a specialist logistics and shipping provider replace spreadsheets with real-time financial insights for smarter decision-making

“Sage Intacct Planning makes forecasting effortless, giving us instant insights for smarter decisions.”

**Kayleigh Kelland**

Finance Director, Osprey Shipping



### The challenge

With complex multi-entity operations, Osprey Shipping's financial planning relied on manual Excel processes, making budgeting inefficient, consolidations time-consuming, and financial visibility unclear.



### The solution

Sage Intacct Planning replaced Excel-based budgeting, improving forecasting, consolidating finances in real time, and automating reporting—giving Osprey Shipping's finance team better data and greater strategic control.



### Results with Sage

Osprey Shipping's finance team now spends less time on admin and more on strategy, with Sage Intacct enabling automation, accuracy, and up-to-date insights for better business decisions.

- 5-year financial forecasting enabled for strategic growth.
- Real-time reporting replaced manual Excel processes.
- Automated consolidations removed reliance on external accountants.
- Finance team freed for value-adding tasks.

Sage

#### Company

Osprey Shipping

#### Location

United Kingdom

#### Industry

Logistics & Transportation

#### Sage Products

Sage Intacct, Sage Intacct Planning, Sage Intacct Consolidations

**OSPREY**

#### About Osprey Shipping

A long-time Sage champion of Sage Intacct, Osprey Shipping provides specialist logistics, engineering, and heavy transport solutions, delivering large-scale projects across nuclear, renewables, petrochemicals, and infrastructure.





### Clearing the fog of financial challenges

Managing large-scale logistics projects means juggling multi-entity accounts, cross-departmental reporting, and long-term financial planning. But for years, Osprey Shipping's finance team relied on Excel spreadsheets to manage budgets, forecasts, and consolidations. This manual approach led to fragmented data, duplication errors, and inefficiencies, making it difficult to gain a clear view of financial health.

"Before, everything was done in Excel across multiple files," explains Reece Boyes, Management Accountant at Osprey Shipping. "It was disjointed and prone to error—pulling everything together into a single view was a challenge."

Financial consolidation was another headache. Year-end entity consolidations were handled manually in Excel or by external accountants, making it time-consuming and reactive rather than an ongoing financial process.

Osprey Shipping needed a scalable solution that would eliminate manual work, centralise financial data, and provide on-the-spot visibility. With growth and diversification on the horizon, they needed a modern, automated system that could support their future ambitions.

### Bringing finance into the future

Osprey Shipping had already been using Sage Intacct for core financial functions, but much of its advanced functionality wasn't fully utilised. When Kayleigh Kelland joined as Finance Director, she recognised an opportunity to expand the role of Sage Intacct within the business.

"When I arrived, Sage Intacct was being used for the basics," says Kayleigh. "We knew it could do so much more, so we focused on unlocking its full potential."

The team introduced Sage Intacct Planning, moving all budgeting and forecasting away from Excel and into a single, centralised system. They also began implementing Sage Intacct Consolidations, with plans to fully automate financial consolidation across all entities—removing reliance on external accountants and simplifying month-end reporting.

"Sage Intacct Planning has been a game changer," Reece explains. "Budgets are now centralised, easy to update, and error-free. We can model different scenarios instantly, something that used to take hours in Excel."





Sage Intacct Planning gives Osprey Shipping the power to model different financial scenarios in minutes, not hours. Long-term forecasting is now faster, clearer, and more accurate than ever before.

### **Smarter planning for sharper strategy**

One of the biggest benefits of Sage Intacct Planning has been the ability to create accurate, long-term forecasts.

“Previously, our budgets were scattered across different Excel files, making it difficult to track and consolidate,” says Reece. “Now, everything is in one place, and we can instantly see how different decisions impact our 5-year plans.”

The scenario planning within Sage Intacct has also transformed how the team approaches budgeting. “We can model ‘what if’ scenarios in minutes, rather than rebuilding a spreadsheet from scratch,” adds Kayleigh. “It’s given us a level of agility and confidence we didn’t have before.”

With operations spanning multiple industries and projects, Osprey Shipping needed financial tools that could adapt to different economic conditions and market shifts. The ability to quickly test different budget models has helped refine long-term strategy and ensured that financial decisions are data-driven, not reactive.

### **Live insights, fewer delays**

Manual reporting is now a thing of the past. With Sage Intacct, live dashboards provide an up-to-date view of financial performance across departments and entities.

“The dashboards mean we’re no longer spending time on manual data entry and reconciliation,” says Reece. “We have live financial data at our fingertips, so we can focus on value-adding work rather than chasing numbers.”

Leadership now has instant access to reports, eliminating bottlenecks in decision-making. “Our senior team can pull up-to-the-minute data themselves, rather than waiting for finance to generate reports,” says Kayleigh. “It’s made us more agile and proactive.”

Managing multiple currencies is also now seamless. “One of the big things for me that it helps with is the multiple currencies,” says Kayleigh. “If you’ve got multiple currencies within your businesses, then actually it alleviates a lot of those issues for you.” With built-in multi-currency functionality, exchange rates update automatically, and financial data consolidates seamlessly across currencies. This has simplified reporting, improved cash flow forecasting, and made it easier to assess funding needs and revenue diversification.

### **Financial consolidation without the choppy waters**

Osprey Shipping’s finance team is now rolling out Sage Intacct Consolidations to bring financial reporting fully in-house.

“Previously, consolidation was left to the accountants at year-end,” says Kayleigh. “Now, we’re setting it up so we can generate consolidated reports monthly—at the click of a button.” By automating consolidations, Osprey Shipping is removing inefficiencies that slowed financial reporting. “We’re eliminating the manual Excel work that used to take hours,” Reece adds. “Soon, we’ll have a fully automated, real-time view of our finances.”





“Sage Intacct has streamlined our finance operations, freeing us to focus on strategy.”

**Kayleigh Kelland**

Finance Director, Osprey Shipping

**Sailing ahead with a future-proofed finance team**

With Sage Intacct Planning and Consolidations, Osprey Shipping has transformed its finance function—moving away from manual processes, gaining live financial visibility, and creating a scalable foundation for growth.

By reducing time spent on admin, the finance team is now free to focus on strategy, forecasting, and business insights. Consolidation is becoming automated, and leadership has access to instant, accurate financial data.

Looking ahead, Osprey Shipping remains committed to continuously optimising its Sage Intacct setup. “We regularly review new Sage Intacct updates to make sure we’re always improving,” Kayleigh notes. “There’s always something new to help us work smarter, not harder.”

With Sage Intacct, Osprey Shipping’s finance team is leaner, faster, and more strategic than ever before—fully equipped to support the company’s next stage of growth.





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