



Infor case study

Bernicia Homes

Bernicia Homes is a highly respected housing organisation providing and maintaining quality and affordable homes, delivering a range of exceptional services for people in the North East of England.

For over 50 years, they've worked incredibly hard to earn a reputation as one of the country's leading housing providers and currently manage 14,000 properties, employing over 500 staff with a turnover in excess of £70m.

The requirements

In 2016 Bernicia initiated a new multi-year finance strategy, a key part of which was to re-engineer their finance system into one, consolidated, group-wide platform.

Furthermore, they had a desire to modernise their approach to reporting and budgeting and were keen to understand if there were technologies available to help.

The solution

Deploying Infor SunSystems to deliver a consolidated finance platform.

Our approach to working with Bernicia Homes has been one of continual evolution. Deploying our PQIS project management methodology allowed us to quickly identify the design of a solution that would deliver the required re-engineering of their finance system onto a consolidated group-wide platform.

This resulted in the deployment of SunSystems, Infor's integrated and modern enterprise-level finance system.

A complex project, one of the key challenges was taking 25 years of financial and operational data and making it usable within their new consolidated platform. Our in-depth SQL knowledge, alongside our expertise in both the housing sector and of complex SunSystems deployments, ensured we were able to take Bernicia's data from their existing, multiple finance subsidiaries into a consolidated structure for deployment into their SunSystems platform.

Modernising Bernicia's reporting and budgeting capabilities

Following the deployment of SunSystems, we turned our focus to working with Bernicia to modernise their forecasting, reporting and budgeting processes, tackling this as a two-step project – step one focussed on budget reporting with step two delivering enhanced forecasting and budgeting.

Our solution was to enhance their SunSystems platform with Infor Dynamic Enterprise Performance management (d/EPM).

Step one enabled budget holder reporting, providing Bernicia's finance team with access to their reporting in a web-based application, removing the need to share multiple excel spreadsheets across the team whilst empowering individual budget holders with greater insights and the capability to drill down on transactions of interest.

With step two the focus shifted to budgeting and forecasting, with Bernicia now able to model their plans more effectively and streamline the budget process, providing managers with a powerful budget tool.

This is due to d/EPM unlocking previously siloed data from across the organisation, enabling the finance team to take a holistic view of the organisation's past and present financial performance when looking to forecast future outcomes.

A focus on continuous improvement - upgrading Bernicia to SunSystems 6.4

In 2020 we delivered a further project with Bernicia Homes, this time to upgrade the organisation to SunSystems 6.4. This is something we've delivered with several of our housing customers in 2020 and in completing the upgrade Bernicia now benefit from:

- / Strengthened security with improved automated single sign process and financial data storage**
- / Improved reporting capability with access to Infor Q&A (Vision) allowing the finance team to create, run and manage their reporting from a single web-based application**
- / 64-bit support, majorly outstripping the 3GB memory limit from their previous SunSystems version**
- / Process efficiencies, particularly around the procurement related PO and invoicing process**

A further, major benefit in Bernicia's upgrade to SunSystems 6.4 was access to Operating Service (OS), Infor's solution to centralising all finance systems and applications under one platform. With the deployment of OS, Bernicia are able to access:

- / Integrated document management suite**
- / Fully digital workflow and authorisation processes with inbuilt audit trail**
- / Capability to interact with all their SunSystems finance data anytime, anywhere, a major benefit in the Covid restricted world**
- / Greater team collaboration with instant messenger-style communications**
- / A modern interface, built with user insight at its heart and with the capability to build multiple bespoke dashboards**

“We laid out a complex challenge to the consultants at Castle, and latterly Kick ICT, to first understand our system before designing a solution that would allow us to consolidate all our financial requirements onto a centralised platform.

Today we operate from a modern, integrated and easy-to-use finance management platform that's allowed us to meet one of our key business objectives of becoming a more financially resilient group.

Importantly, as we all continue to adapt our organisations to the challenges of living through a pandemic, we now have the technology that provides us with access to our key financial data and applications anytime, anywhere, and in a secure manner.”

Janette Longstaff / Executive Director

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