

# CHALLENGE COMMUNITY SERVICES

idu-Concept in Australia supporting Challenge Community Services as they support others.



## THE BUSINESS CHALLENGE

In early 2013, with a large and growing footprint and branches scattered over northern NSW and over 200% revenue growth in 5 years, Challenge realised that using Excel spreadsheets for budgeting and providing static monthly financial reports to managers was no longer working.

“While the organisation was small and most branches were within easy reach of head office, running around with a laptop and doing budgets in Excel did achieve the desired outcome, but not without the usual spreadsheet headaches,” says Carl Learson, Executive Manager Support Services. “We were also distributing static management reports, including variance reports, on a monthly basis, with no ability for management to drill down and fully understand what made up the numbers and this was increasingly frustrating and inefficient,” elaborates Learson.

“Increasing branch numbers, a larger footprint, and more financially informed managers demanded a more intelligent solution.”

## ABOUT CHALLENGE COMMUNITY SERVICES

Challenge Community Services was established in 1958 as the Tamworth and District Handicapped Children's Association. Since then, Challenge has grown to become one of the largest disability and community support services in regional NSW.

Challenge employs over 580 staff, 125 of which have a disability, and offers a range of services across the North West, Central West, New England and Hunter regions of NSW.

Services include lifestyle, community access, accommodation and vocational support for disadvantaged children, young people and adults. Challenge also operates a number of business enterprises which provide training and employment opportunities to people with disability.

These business units assist people with disabilities to develop the skills required to undertake meaningful, paid employment.

# THE SOLUTION

Challenge began their search for a solution online, through the company's auditors and through their accounting software support providers. There were a number of solutions put forward but none ticked all the necessary boxes.

"The solution had to be able to consolidate roughly 100 individual budgets without integrating spreadsheets as well as being accessible from any one of our branches to minimise travel at budget time," explains Learson.

"Because of our dynamic environment, the solution had to easily accommodate organisational changes, new cost centres, and various reporting formats to suit individual user's needs. We also had to be able to easily revise our forecasts and cast budgets for more than one financial year. In addition it had to provide management accounts that allowed users to drill right down to the journal entry so that they could fully understand the transactions; and the solution needed to offer more than just budgeting and basic reporting – it had to be customisable so we could tailor reports to unique organisational requirements."

After meeting up with the idu-Concept team in Sydney and having an in-depth look at their product, the Challenge team realised they had found the right solution for them. The product was able to meet all their requirements and integration with the accounting software they used had been well established.



"We didn't want to be an experiment," explains Learson, "idu-Concept already had an established market place with customers who had similar geographic challenges to our organisation and the references offered by a number of those organisations confirmed our decision. And the price, while more than we had budgeted for, was considerably lower than the next level of solutions which were really only suitable for major corporations."



## EMPOWERMENT & TRANSPARENCY

idu-Concept made it possible to establish a budgeting model that empowered the Challenge regional management teams and spread the workload at budget time right down to the branch managers and supervisors.

"They now have all the information that they need right at their fingertips, can complete the data entry, flag the budget for line management review and the budgets are immediately consolidated," says Learson. "The regional management teams are further empowered with accurate and live management reports that provide full transparency around their accounts."

# CUSTOMISABLE REPORTING



idu-Concept has also been able to develop multiple dimension reports that the Challenge team had never been able to achieve with their previous solution. “The easily customisable reporting layouts mean that we’ve created reports to suit different users, from the board through to the branch supervisor, not something we could have achieved previously because of the administration time required to maintain the reports.”

“Ultimately, we’ve now given our managers the tools they need to be responsible for managing their budgets and we’ve had all the incidental benefits such as accuracy, drastically improved timelines, reduced travel, and transparency,” says Learson.

Challenge utilises the idu-Concept Budgeting and Reporting modules. “Unlimited customisable reporting layouts, together with drag and drop features, mean that idu-Concept makes it really simple and efficient to slice and dice our business in ways that we’d never dreamed of doing before,” says Learson. “We can now analyse performance by lines of business, geographic regions, General Ledger account, to name just a few.”

“Every branch supervisor right through to the CEO has access to idu-Concept and actively reviews information relevant to their needs,” says Learson. “As staff members understand the capability of the tool and the new level of transparency they have around their businesses, the normal response is disbelief at the amount of access to information they have.”

“Working with IDU has been hugely beneficial to the way in which we manage our business,” says Learson. “The software is truly innovative and provides us with so much range and support.”

“The greatest pain we were experiencing came from geographic footprint and significant growth. We just couldn’t get the right information out to our management teams,” says Learson. “There was no way to quickly and efficiently add cost centres, rearrange management structures or modify reporting layouts; and we had no way of bringing so many budgets together efficiently and accurately. idu-Concept has addressed all these issues.”

“We would definitely recommend idu-Concept to other organisations experiencing the same hurdles that we did. We have experienced first-hand how this solution can transform aspects of management culture and accountability, empowering staff and giving them the tools to manage their businesses.”



## ABOUT IDU

IDU delivers top of class packaged budgeting, forecasting, performance management and reporting tools to simplify financial management. Our flagship product, idu-Concept, provides easy, effective budgeting and financial reporting for medium-sized to large businesses. idu-Concept integrates easily with ERP software, but unlike more cumbersome offerings, idu-Concept can be implemented quickly, requires little or no ongoing consulting fees and reduces budgeting cycles from months to weeks.