

SOUTHERN METROPOLITAN CEMETERIES TRUST

IDU simplifies and speeds up budgeting and planning at SMCT.



THE BUSINESS CHALLENGE

SMCT successfully runs a sophisticated community-based, not-for-profit service managing 8 cemeteries in the Melbourne area, all with a very diverse range of memorialisation, facilities and services available to clients.

Planning for and managing a multitude of offerings across multiple locations, stakeholders and operations had become a significant administration and finance burden.

There is a need to not only closely plan and monitor the volumes of each type of memorialisation package and service per cemetery, but also keep a close eye on expenses and committed resources.

The Finance team found that using Excel to plan and budget across multiple locations and operations was both time-consuming and increased the possibility of errors within the process during both the creation of the plans and whilst consolidating all the information. SMCT sought a better way of doing this.

ABOUT SMCT

The Southern Metropolitan Cemeteries Trust (SMCT) is a not-for-profit, community based organisation that cares for Brighton General, Bunurong Memorial Park, Cheltenham Memorial Park, Cheltenham Pioneer, Dandenong Community, Melbourne General, Springvale Botanical and St Kilda cemeteries.

A passionate and highly skilled Board with a range of diverse backgrounds and experience oversees the strategic direction of SMCT.

SMCT understands the requirement to continually evolve both the organisation and the industry, to meet the changing needs of the community.

THE SOLUTION

After an introduction to IDU's Concept suite of Budgeting and Reporting software at a Sage customer day they decided to implement the Financial Budgeting, Forecasting and Reporting modules in late 2013. Soon thereafter they also purchased IDU's Revenue Budgeting and Reporting modules to enable detailed revenue and resource planning.

According to William Au, SMCT's Financial Analyst, idu-Concept has made the whole budgeting, planning and management reporting processing both much simpler and far less time consuming. The availability of accurate, relevant information for all their users, both in Operations and Finance, means they can do their jobs more effectively with a minimum fuss around data provision, response and action.

"Our managers really like using IDU, they have found it much easier to use than previous systems and it saves everyone a significant amount of time. IDU has systematised our planning processes, providing us with a single point of access to accurate and timely management information."

"Also, once the Revenue Module of IDU was implemented, it significantly reduced the amount of time the sales managers took to input their sales forecasts at a very detailed level. The ability for finance to manage the backend (i.e. setting organisation-wide pricing etc.), allows the sales managers to really focus on their specific strategies and sales initiatives."



“Overall, IDU has also removed the opportunities for human error and formula errors that occurred in our previously excel based budget process, and markedly decreased the time taken to set up each month’s forecast or each year’s budget as all the data is already there and a rollover only takes a few clicks.”



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.