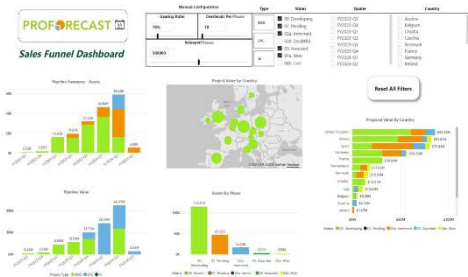
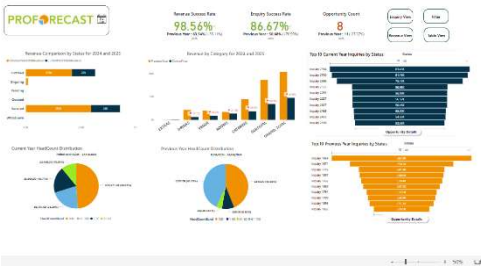


Case Study

Charities



Demand Forecasting & AI Inputs



Introduction

- The client is an award-winning UK charity serving a wide range of users: young people, families, vulnerable adults, community groups, sports teams, youth clubs, and even business and arts communities.
- With annual revenues exceeding £5 million and a team of 150+ employees, the charity uses Sage 50 as its general ledger.
- **The finance team sought a budgeting and reporting solution that would:**
 - Improve decision-making agility.
 - Offer greater flexibility than spreadsheets.
 - Enhance board and colleague reporting with visual, customizable outputs.
- **Key requirements included:**
 - Customizable financial reports.
 - Advanced forecasting and “What If” scenario planning.
 - Team collaboration features.
 - Specialist KPI and dashboard creation.
- ProForecast partnered with the Finance Director to implement the system and train the finance team.

Clients Pain Points

- Excel-based budgeting and reporting was time-consuming and error-prone due to limitations in Sage 50.
- Collaboration across departments was difficult, slowing down the planning cycle.
- **The finance team struggled with:**
 - Building monthly reporting packs.
 - Producing accurate budgets and cash flow forecasts.
 - Adding new activities and cost centres mid-year.
 - Limited micro “What If” planning tools.
 - Managing payroll forecasts and adjusting salaries/hours.

Case Study

Charities

PROFORECAST

ProForecast offers Mid-market Businesses' flexible, cost effective and comprehensive forecasting and strategic planning capability incorporating AI and Machine Learning.

ProForecast fully integrates into the core accounting system, providing businesses with a powerful and transformational tool to enable management to make informed decisions quickly and accurately.

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Quality Of Support

- Support rated 8/10, described as responsive and effective.
- Implementation was smooth and completed within days.
- Remote training and help materials enabled fast user adoption.
- FP&A consultants tailored the setup to the charity's structure, saving time especially during period-end and re-budgeting cycles.

Application Strengths

- Comprehensive reporting and dashboard tools simplified month-end routines.
- "What If" functionality supported scenario planning during periods of uncertainty.
- Templates and dashboards reduced finance team workload and improved collaboration.
- The system helped the charity adapt quickly to changing needs over the years.

Application Dislikes

- Charity-specific terminology is still being added, but development is underway.

Desired Features

- Charity-friendly accounting structure.
- Flexible field customization.
- Easier configuration for charity cost centre structures.

Conclusion

- As an early adopter, the charity has seen long-term benefits from ProForecast.
- The platform has delivered improved accuracy, enhanced reporting, operational efficiency, and stronger collaboration across teams.