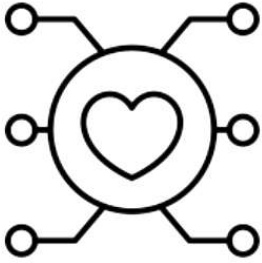


# Case Study

Not For Profit



## Introduction

- The client is a UK-based educational charity with a mission to promote plant biodiversity through conservation, education, engagement, and enjoyment.
- Their vision is for a diverse botanical world that enhances life for all.
- Annual turnover exceeds £2 million, supported by a team of 33+ employees.
- Core accounting is managed via Sage 200.
- As reporting demands increased, Excel-based budgeting became a limiting factor—prompting the search for a more scalable, intelligent FP&A solution.

## Pain Points

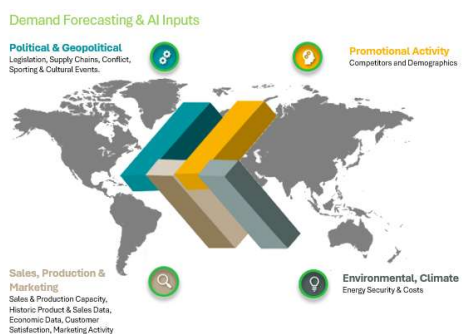
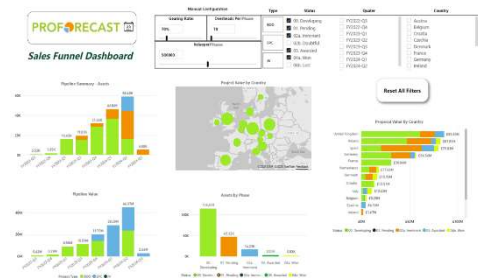
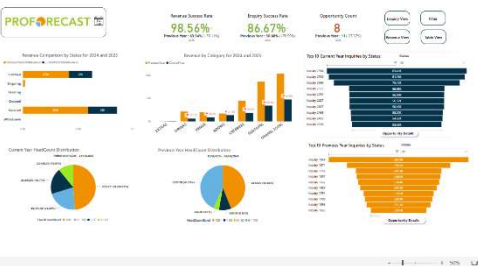
- Excel workflows were:
  - Time-consuming and error prone.
  - Inflexible for rapid reporting cycles.
  - Difficult to scale with growing operational complexity.
- Key challenges included:
  - Producing stakeholder-ready report packs under tight deadlines.
  - Importing and managing large volumes of financial data.
  - Collaborating across departments with limited visibility.
- The client required:
  - Customisable financial reports.
  - Seamless Sage integration.
  - Advanced “What If” scenario planning.
  - Business process templates tailored to nonprofit operations.

## Implementation Strategy

- ProForecast’s FP&A team delivered a smooth onboarding experience.
- A custom model was built to reflect the charity’s structure and reporting needs.
- Training was provided to all users, with ongoing support for new team members.
- The system was configured to handle short reporting cycles and automate period-end processes.

## Benefits Realised

- Improved accuracy in financial forecasting and planning.
- Enhanced visibility into performance and cash flow.
- Faster month-end closing and reduced manual workload.
- Increased confidence in financial data among staff and stakeholders.
- High-quality reporting outputs tailored for board and donor presentations.



# Case Study

## Not For Profit

## 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 as good to excellent.
- FP&A consultants were approachable, responsive, and effective.
- Despite the volume of data and complexity, setup was completed within a tight timetable.

### Application Strengths

- Intuitive and convenient for the finance team.
- Extensive business templates enabled rapid setup of new departments and projects.
- “What If” tools and BI package supported dynamic scenario modelling.
- Reporting quality and stakeholder engagement were significantly enhanced.

### Application Dislikes

- The team would like broader integration of Rapier AI across the platform.

### Desired Features

- Real-time data updates (available now).
- Automated data import from external sources (available now).
- Customisable dashboard widgets.
- Expanded customization options.
- More nonprofit-specific templates.

### Conclusion

- The charity has used ProForecast for several years and built a strong working relationship with the team.
- The platform has delivered measurable improvements in accuracy, efficiency, and collaboration.
- It is considered a sound investment with a positive ROI and strategic value.