

# Userstory : SELWOOD HOUSING



"The current environment is putting pressure on all organisations and businesses and Selwood Housing is no exception. Compleat Spend Control provides the comfort that we are making the most of the funds available to us and our customers are beneficiaries"

**Claire Nicholson, Finance Team Manager for Selwood**

SPEND CONTROL

# Selwood Housing take 100% control of their spending with Compleat Spend Control Solution.

**Selwood Housing is taking 'Compleat Spend Control' with Compleat's Purchase to Pay (P2P) solution. The solution, which is tightly integrated into Selwood Housing's Microsoft Dynamics GP financial accounting system, is highly valued by its 75 users and puts management in full control of corporate spend.**

Selwood Housing is a charitable housing association and social enterprise based in Trowbridge, Wiltshire with over 5,600 homes across Wiltshire and Somerset.

Selwood Housing has 150 staff that cover a very diverse and broad range of activities and services for their customers and half of these staff are involved in purchasing. They identified an urgent requirement to manage their purchasing better and increase the effectiveness of their spend.

It was evident that their manual purchasing process was taking up far too much of valuable staff time and due to the diverse activities of Selwood Housing, many areas of the business were dealing with their own preferred suppliers who were offering similar goods and services.

So Selwood Housing initially reviewed adding the purchase order processing functionality to their Microsoft Dynamics GP accounting solution, but quickly established there were a number of significant limitations.

Primarily Dynamics like many Purchase Order Processing software, starts too late in the purchasing cycle.

Selwood Housing wanted to capture the request to purchase at source and then ensure that the requisitioner was using the preferred suppliers, that spending was within the budget and that the appropriate authorisation process was adhered to every time.

The next limitation was complexity. Selwood Housing has 75 staff involved in procurement processes who are outside the Finance department so they had to have access to software that was easy to use.

## At a Glance

**COMPANY: SELWOOD HOUSING**

**CHALLENGE:**

Selwood Housing identified an opportunity to manage their purchasing better and increase the effectiveness of their spend. Their manual purchasing process was taking up far too much of valuable staff time and many areas of the business were dealing with a diverse selection of suppliers who were offering similar goods and services.

**SOLUTION:**

Compleat's easy to use, fully automated web browser Spend Control software integrated with Selwood Housing's Microsoft Dynamics GP financial accounting system, has given them absolute control over who they buy from, an accurate record of what they agreed to pay and can immediately identify any purchase invoice discrepancies.



## SPEND CONTROL

Many finance applications today are mature in functionality, but not designed to be used by non-accounting staff.

But perhaps the biggest barrier was price. The cost of 75 additional users of an accounting application was simply prohibitively expensive and outweighed the commercial benefits.

Selwood Housing was introduced to Compleat's Spend Control Solution, this browser based application is extremely easy to use and tightly integrates into MS Dynamics GP accounting software therefore meets all of their accounting requirements. It delivers budget control during the purchasing process, and gives users sight of every financial commitment as it is made. Compleat also automates the purchase invoice capture and approval process and once approved, posts the transaction directly into the accounts.

### The Implementation Project

Selwood Housing needed to change the working practises of half of their staff and recognised that this would determine the success or failure of the project.

Claire Nicholson, finance team manager for Selwood explains:

"Compleat consultants helped us immensely in dealing with this challenge – ensuring we fully understood how the system operates so we set up in the right way first time! We started the process with a pilot of two departments, finance and IT. We kept it very simple and involved all of the effected staff in the process and had immediate success."

Following the initial pilot, each new department was involved in the roll out planning to ensure that any unique requirements were identified to make the process of going live more straightforward and successful.

Compleat also ensured that Selwood Housing staff was trained to a level where they were able to take over the project and undertake the roll out under their steam – saving a great deal of money and time.

The full roll out was completed in November 2010 and achieved 100% user adoption. Claire comments:

"Everyone loves Compleat – it has made all of their jobs so much easier whilst putting the management in total control of all of organisations spending".

Ian Harrington, head of procurement added "Before Compleat, it was very challenging to change the purchasing habits of all the staff and ensure that they always used our preferred suppliers to get the best pricing and terms.

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**Claire Nicholson, Finance Team  
Manager Selwood**

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"Once we were live on Compleat, we informed all of our suppliers that we would return any purchase invoice that did not have an official order. The outcome is our supply relationships have improved, as there are very few queries and they get paid on time. Everyone wins!"

Selwood Housing has absolute control over who they buy from, an accurate record of what they agreed to pay and immediately identify any purchase invoice discrepancies. They can make sure they are getting the best value for money and savings can be reinvested back into the quality and breadth of services on offer to their customers.

Neil Robertson, CEO of Compleat comments "Claire and Ian have done a great job at Selwood. They fully understood and agreed that working and supporting their staff through the transition was a critical part of this project and worked hard with us to achieve it. By becoming self-sufficient Selwood are now able to take 100% control of their spending."

Claire concludes: "The current environment is putting pressure on all organisations and businesses and Selwood Housing is no exception. Compleat Spend Control provides the comfort that we are making the most of the funds available to us and our customers are beneficiaries."

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**Claire Nicholson, Finance Team  
Manager Selwood**

**Take the first step and book a  
Short Form Review meeting**

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