

# Case Study

indigo



## Background

November 2012 saw Indigo Planning celebrate its 25th anniversary. As chartered town planners, the practice provides specialist planning and advice to house builders, commercial developers, land owners, occupiers and financial institutions. With 80 members of staff and offices in London, Manchester and Leeds, Indigo Planning works with clients across the UK, devising planning strategies and appraisals, leading on planning applications and appeals and appearing as expert witness.

## Problem

Indigo Planning realised it had outgrown the processes and systems in place to support project and financial management at the practice. As a result, the business identified inefficiencies with operating different software packages and using manual processes. Information was being re-keyed into different systems, reports were produced with such a time delay that they were out of date and retrieving project information was extremely time consuming. With a Sage ledger system for corporate accounts, Excel spreadsheets for fee forecasting, a standalone software solution for time recording and nothing for resource management, the business set about its search for a single software solution.

## Solution

Indigo Planning reviewed a few options and was first introduced to Union Square at an industry seminar. Union Square for Project Accounting is an integrated software solution that captures all fees, invoices, time, expenses and disbursements, alongside forecast and budget information, for a clear view of project profitability. The system would address everything involved in tracking project profitability and with Sage integration the system could link directly to Indigo Planning's financial ledger, removing manual processes for a more automated approach. After a full demonstration of the system's capabilities Indigo Planning was sold!

### Company

Indigo Planning

### Business

Planning Consultant

### Number of staff

80

### Solution

Union Square for Project Accounting

“The business identified inefficiencies with operating different software packages and using manual processes.”

**UNION SQUARE**  
FOR PROJECT ACCOUNTING

## Implementation

Indigo Planning opted for a phased approach to rolling out the system, implementing one function at a time. Time recording was introduced first as it was simply a case of switching from one system to another and represented the smallest change for users to adapt to. Once users had familiarised themselves with the system the full project accounting solution was rolled out. Staff were fully supported throughout this process with in-house training sessions arranged to bring them up to speed. 'Super users' were appointed in each office and attended 'train the trainer' sessions at Union Square's offices, enabling them to answer questions and resolve issues on a day-to-day basis. Communication was a key part of the roll out with weekly updates breaking down the details into bite-sized chunks and keeping staff engaged.



## Benefits

Indigo Planning is now realising the benefits of the Union Square for Project Accounting system, which include:

- **Accessibility of information** – Being a web-based system Union Square can be accessed from anywhere with an internet connection. This allows staff to work from home and access information or update timesheets, while on the go. The structured approach to managing information makes it much easier to find data in the system quickly and KPI reports can be run at the click of a button.
- **Delegation of financial control to project managers** – Invoicing is now controlled at a project level, which has sped up the payment cycle and improved cash flow across the business. It has also given project managers more financial responsibility for their projects.
- **Transparency of financial information** – The whole business has better visibility of project profitability in real time. This means early action can be taken to identify the need for budget changes, to improve relationships with clients.

## A Q&A with Doug Hann, Director

### How have things moved on since you first implemented the system?

We've done quite a bit of work to customise the system, personalising the tabs and building a suite of management reports.

### What has been the main benefit you have realised?

The time we've saved as a business has been huge. Everything gets done much quicker: invoicing, processing timesheets, reporting and accessing data. We're no longer duplicating our efforts by re-keying data into different systems and the information we have is always up-to-date which allows for good decision making.

### What were some of the challenges you faced?

The change management aspect of this software implementation has been challenging at times. Getting people to work in a different way to what they know is never easy and, even with all the training and communication in place, there were some people who found the change difficult.

### What are the next steps for you as a business?

Next we plan to introduce resource planning. This will help us finesse our use of staff time and resources to better allow us to provide the best response to client demands. By formalising this we hope to make the whole function more efficient and get a better idea of future capacity and recruitment needs across the business.



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