Greentree
PRIMED FOR BUSINESS

ERP SOFTWARE **SOLVES** CHARITY'S CONCERNS

Greentree tackles business problems, so a not-for-profit can get on with its core work.

CHALLENGE Concern Universal needed live visibility of its aid projects across the globe and better database management across multiple currencies.

SOLUTION Greentree's integrated financial management, job costing and CRM keep Concern Universal's staff up to date, wherever they may be.

RESULTS Project reporting and data flow is improved with live project information available around the globe. With better visibility, administration time can be reduced, with more time available for work on the ground.

Photo: Concern Universal / Jason Florio

"By centralising our systems, Greentree helps us spend less time administrating, and more time improving the lives of people in poverty."

Viv Mair, Systems & Services Co-ordinator
Concern Universal

"Before we had centralised live data, visibility was difficult across the whole organisation. We struggled to keep track of submitted proposals, budget deadlines and project timeframes. With multiple manual systems and processes, our systems management was time intensive and laborious." Viv Mair, Systems & Services Co-ordinator for UK-based global charity Concern Universal saw the potential Greentree had to improve operations.

Making a difference

Since 1976, Concern Universal has been improving the lives of millions of people living in poverty across Africa, South America and the Asian sub-continent.

"We work to promote justice, dignity and respect for all," explains Chief Operating Officer, Matthew Lake. "We try to ensure that people can make a decent living; that they have access to clean water and sanitation; and that they have access to the rights and government services to which they're entitled, such as health care and education."

Concern Universal is contracted by large institutions including the UK and US Governments and the European Union. With complex reporting requirements, detailed budget management and multiple currency transactions, Concern Universal needs a sophisticated system to support all these operations.

"It's difficult to track live project information in remote regions due to our complex reporting processes," said Viv. "The time it took to enter information manually and submit it to various formats to multiple systems means Field Staff spent lots of time at their desk, when it could be spent out on the ground, helping people."

Life or death

Live information and project visibility can mean life or death for those Concern Universal helps. With sufficient management and forward projections of budget and timescales, Concern Universal can predict any issues with cash flow due to delayed funding. A late payment can mean a missed planting season and a family without

Photo: Concern Universal / Robin Wyatt

food, or a cancelled food distribution which risks lives as well as the charity's reputation. Concern Universal works in multiple currencies, which made project costing and reporting even more difficult for financial staff, with ever-changing exchange rates and unpredictable inflation of local currencies adding to the complexity.

Concern Universal needs a Cloud-based system to keep infrastructure costs low, with integrated financial management, job costing and customer relationship management essential to its operation. Its field offices tend to be located in remote areas, so a cloud-based system also allows access from smart phones and tablets using 3G. It means project managers can easily update financial and project data when they can get online.

Viv says, "We needed pro-active visibility from the source, so that data could be entered into a live database that everyone could access, wherever in the world they were, and know that it was up-to-date information."

Meeting growth

Concern Universal can now meet expected growth in demand for its services by being one of the most responsive international development charities. Its head office in the UK has its finger on the pulse of all

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its projects worldwide. Donor reporting and project tracking has been made quicker and easier, while Greentree's multi-currency facility greatly simplifies the conversion process. What's more, with all its data in one system, Concern Universal's staff can get out of the office and into the field, where they are needed most.

"We take huge pride in knowing that our work is efficient, effective and sustainable," Viv says. "It used to be time-consuming for us to capture, track and monitor data - now we can provide an even better service to our supporters.

"Most importantly, by centralising our systems, Greentree helps us spend less time administrating and more time improving, the lives of people in poverty."