

Success Story

Oakhaven Hospice futureproofs funding with Sage Intacct

Palliative care provider achieves real-time reporting, automation, and financial clarity to make informed decisions and boost fundraising efforts

“With Sage Intacct, we can now break down our financials into something tangible—helping us communicate our impact clearly.”

Alison Taylor

Finance Director, Oakhaven Hospice



The challenge

Oakhaven Hospice’s finance team struggled with time-consuming manual reporting and limited visibility. The lack of real-time data made it difficult to communicate how funds were used, slowing decision-making and fundraising efforts.



The solution

Sage Intacct provided real-time, automated reporting, and detailed, granular insights, eliminating the need for spreadsheets and disconnected tools.



Results with Sage Intacct

With instant access to accurate financial data, Oakhaven Hospice streamlined audits, improved fundraising communication, and empowered managers with the real-time financial oversight to continue delivering vital care.

- Financial reporting time significantly reduced.
- More confidence in budgeting and forecasting.
- Self-service dashboards empower managers with real-time insights.
- Financial storytelling strengthens NHS and donor engagement.

Company
Oakhaven Hospice

Location
United Kingdom

Industry
Healthcare (Nonprofit)

Sage Products
Sage Intacct

About Oakhaven Hospice

Oakhaven Hospice provides specialist palliative care across the New Forest, supporting patients and families at the hospice and at home.



Tangled up in spreadsheets instead of focusing on care

Before Sage Intacct, Oakhaven Hospice's finance team struggled with slow, manual processes that hindered their ability to support the hospice's vital work. Reporting across departments was time-consuming, pulling finance away from their real focus—ensuring the hospice had what it needed to provide outstanding patient care.

Management accounts were labour-intensive to produce, involving manual compilation, checking, and distribution. These delays left budget holders without real-time visibility, making it harder to control spending and make informed decisions. Tracing individual transactions was also time-consuming and required navigating across disconnected systems.

With just 11% of income from government funding, Oakhaven relies on accurate financial insight to continue providing care. The ability to clearly show funding needs to grant providers and donors can be the difference between sustaining vital services and making cuts. Oakhaven needed real-time visibility, fast reporting, and unified data—freeing them to focus on patients.

Less admin, more impact

Oakhaven Hospice selected Sage Intacct for its granular, transparent reporting, real-time dashboards, and automation—allowing them to move away from spreadsheets and disparate systems.

“I was nervous at first,” admits Alison Taylor, Finance Director. “Ensuring data integrity was my biggest concern, but once we went live, it quickly became clear that Sage Intacct would transform how we work.”

As a charity, Oakhaven are subject to detailed statutory audits. For their small team, these can be quite demanding. With Sage Intacct, one of the biggest early wins was streamlining the audit process. With Sage Intacct, auditors were given direct access to the system, allowing them to retrieve the information they needed without disrupting daily operations.

“Last year's audit was the smoothest I've had since joining Oakhaven Hospice,” Alison explains. “Auditors could drill down into reports and view invoices without us needing to compile extra documentation—it saved so much time.” This efficiency also extends to consolidated reporting, with trial balances now generated instantly and no manual merging required.



With Sage Intacct, real-time dashboards put financial insights at their fingertips, allowing managers to monitor spending as it happens.

Real-time financial control at their fingertips

One of the most significant impacts of Sage Intacct has been in budgeting and financial visibility. Before, department managers had limited sight over budgets, relying on static reports that were often outdated by the time they received them. Now, real-time dashboards put financial insights at their fingertips, allowing managers to monitor spending as it happens.

“We used to spend days reformatting spreadsheets for every department, then answering endless queries,” says Alison. “Now, managers can self-serve their financial reports, saving us several days a month and allowing them to make decisions based on live data.”

Turning financial data into valuable stories

For the team, financial data isn't just about tracking numbers—it's about telling a story that resonates with donors, trustees, and NHS commissioners. Before Sage Intacct, Oakhaven Hospice's finance team struggled to demonstrate how funding translated into real-world care.

“When we present our financials in the statutory accounts, the reader only sees the headline figures,” Alison explains. “But those numbers alone don't mean much. With Sage Intacct, we can now break that down into something tangible—like the fact that our NHS grant, which is 11% of our expenditure, covers just two of our ten inpatient beds or one-third of the community patients we see each year.”

This new level of clarity has been instrumental in funding discussions. “Without Intacct, we didn't have the time or confidence in the data to state those figures so definitively,” Alison says. “Now, we are negotiating our contract with NHS commissioners based on this vital insight.”

For fundraising, this ability to contextualise financials into real-world care has strengthened Oakhaven Hospice's messaging. Potential donors and grant bodies now receive clear, evidence-backed insights into how their contributions support hospice services, making fundraising efforts more compelling.

Less chasing, more decision-making

With multiple funding sources and so many invoices to manage, tracking expenditure efficiently was a major challenge. “Finance would have to cross-check Sage 50, spreadsheets from a reporting software system, and a third-party invoicing tool. It turned simple queries into a frustrating, time-consuming process,” says Alison.

Sage Intacct eliminates this complexity, allowing users to drill down directly from a report to the source in just two or three clicks. “Now, I can just drill down and open the attachment in seconds. It's made such a difference.”



“Sage Intacct provides the visibility we need to plan for the future with confidence.”

Alison Taylor

Finance Director, Oakhaven Hospice

Strengthening future funding

For Oakhaven Hospice, financial clarity is instrumental in securing the future of care, comfort, and dignity for patients and families. Sage Intacct has shifted their approach from reactive financial management to proactive, strategic decision-making, ensuring they can plan with confidence.

Most importantly, this improved financial oversight means Oakhaven Hospice can focus on sustainably scaling operations. Sage Intacct enables them to do this with confidence, accuracy, and efficiency.

As Oakhaven Hospice explores new social enterprise opportunities to generate more valuable funding, Sage Intacct will continue to play a central role in providing the financial insights needed to make the right choices for their patients.



Sage

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