

Success Story

Lifeworks accounts for every penny with Sage Intacct

Devon charity enhances financial visibility and efficiency

“Sage Intacct isn’t just an expense—it’s an investment that pays dividends in efficiency, accuracy and strategic insight. For any non-profit serious about financial management, it’s an indispensable tool.”

Nigel Doran

Finance Manager, Lifeworks



The Challenge

Lifeworks relied on paper-based purchasing systems and outdated accounting software, leading to inefficiencies and delays in financial reporting.



The Solution

Implementing Sage Intacct to replace both the paper-based purchasing system and the existing accounting software, providing an integrated, cloud-based solution.



The Result

Lifeworks achieved near real-time financial reporting, increased efficiency and improved decision-making capabilities, supporting their mission to help young people with learning difficulties.

- Near real-time financial data, updated from 4 weeks to 2-3 days.
- Estimated twofold increase in finance team efficiency.
- Streamlined audit process with fewer queries from auditors.

Company
Lifeworks

Location
United Kingdom

Industry
Non-profit

Sage Products
Sage Intacct

Sage Partner
PwC



About Lifeworks

Lifeworks is a Devon-based charity with a vision to create opportunities for people with learning disabilities to lead fulfilling lives. Their approach centres on inclusivity by fostering a society where everyone feels welcomed and valued, equity by ensuring equal opportunities for individuals with learning disabilities, and empowerment by helping them reach their full potential.



From paper to cloud: transforming financial operations

Lifeworks, a Devon-based charity supporting young people with learning difficulties, faced significant challenges with its paper-based purchasing system and outdated accounting software. Nigel Doran, Finance Manager at Lifeworks, initially sought a solution to replace their paper-based purchasing system, which often resulted in missing documentation and inefficiencies.

During his search, Nigel discovered Sage Intacct, which not only addressed the purchasing system issue but also offered a comprehensive solution to replace their existing Sage 50 accounts software. “It kind of blew my mind, really,” Nigel recalls. “It was so straightforward to use. The insight that it gives is so easy to achieve.”

Seamless implementation and user-friendly interface

The implementation process, spanning 2-3 months, was smooth and well-supported. Sage provided comprehensive training, including generic courses and tailored sessions for Lifeworks’ specific setup. Nigel appreciated the ability to test the system in a development environment before going live, ensuring a smooth transition.

What stood out for Nigel was the ease of use and the minimal learning curve. “My colleague who started just a few months ago picked it up very, very quickly,” he notes. “On Sage 50, the learning curve would have taken much longer.”

Meanwhile, the ongoing support has been exceptional, Nigel adds. “The Sage Intacct community has been invaluable. Whenever we have a query, we can usually find the answer within hours, if not minutes.”



Twice the efficiency, real-time insights, and streamlined auditing with Sage.

Enhanced efficiency and real-time insights

Since implementing Sage Intacct, Lifeworks has seen significant improvements in their financial operations. Nigel estimates that the finance team is now twice as efficient as before. “I think I probably get twice as much done as I used to,” he states.

One of the most significant benefits has been the timeliness of financial information. Previously, accounting data could be up to four weeks behind. With Sage Intacct, financial information is typically updated within 2-3 days. This near real-time data availability has greatly enhanced decision-making capabilities across the organisation.

The impact on day-to-day operations has been substantial. “Before Sage Intacct, I’d often leave tasks unfinished at the end of the day. Now, I typically go home with everything ticked off my list,” Nigel shares.

Streamlined auditing and reporting

The move to Sage Intacct has also simplified the auditing process for Lifeworks. Nigel notes that their accountants and auditors now have direct access to the system, resulting in fewer queries and a more efficient audit process. “We seem to get far fewer questions from them,” Nigel explains. “They seem to be able to find most of the answers straight away themselves without having to come to us.”

Future plans and recommendation

Looking ahead, Lifeworks is considering expanding their use of Sage Intacct to include project and budget planning functionality. This would further streamline their operations by consolidating all financial information in one place, making it easier to report against budgets and track performance.

Intacct: A Greener Future

By significantly reducing their paper consumption, Sage Intacct has also helped Lifeworks make a tangible positive impact on the environment. This reduction not only preserves forests but also contributes to a decrease in greenhouse gas emissions, water conservation, and a reduction in landfill waste. Together, these benefits create a more sustainable future for generations to come.



“With Sage Intacct, our financial data is not just up-to-date, it’s instantly accessible. It’s transformed how we make decisions across the organisation.”

Nigel Doran

Finance Manager, Lifeworks

A worthwhile investment for non-profits

For Lifeworks, the transition to Sage Intacct has been transformative. The cloud-based system has not only improved efficiency and data accessibility but also contributed to cost savings by eliminating the need for on-premises servers.

Addressing potential concerns about cloud-based systems, Nigel notes: “Security was a consideration, but we’re completely comfortable with our data being held in Sage Intacct. Plus, the cost savings from eliminating our on-premises servers have been significant.”

Nigel, who has experience with various accounting packages, enthusiastically recommends Sage Intacct to other organisations, particularly in the non-profit sector. He emphasises the value of the system, stating: “Sage Intacct isn’t just an expense—it’s an investment that pays dividends in efficiency, accuracy and strategic insight. For any non-profit serious about financial management, it’s an indispensable tool.”



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