

## Success Story

# Planning the route to business success with Sage Accounting

The Facilitation Partnership saves time and money, optimising decision-making with Sage

“Sage has changed our management of the business from a month-to-month outlook to a more agile, day-to-day, outlook.”

### Luke Varda

Financial Director, The Facilitation Partnership

Founded in 2013, The Facilitation Partnership helps organisations of all types and sizes to simplify complex business problems through purposeful and productive conversations.

Although its origins are in the north-east of England, The Facilitation Partnership has expanded to operate worldwide, and now helps clients from Middlesbrough to Malaysia – and beyond – to run meetings that amplify diverse perspectives, solve problems and inform strategy.



### Key outcomes

- Approximately 30% saved on accountancy fees.
- Time savings of 5 - 6 days annually thanks to automated report generation.
- 50% drop in inbound enquiries from accountants.
- Multi-currency functionality makes international business straightforward.
- Provides a real-time, accurate snapshot of the business at any time.
- Easy to use and scales with the business.

**Company**  
The Facilitation Partnership

**Location**  
United Kingdom

**Industry**  
Business Services

**Sage Products**  
Sage Accounting



### About The Facilitation Partnership

Founded in 2013, The Facilitation Partnership helps organisations of all types and sizes to simplify complex business problems through purposeful and productive conversations.



### **Agility across sectors and geographies**

Like many start-ups, back in 2013 The Facilitation Partnership did much of its accounting manually. However, as time passed and the business developed and grew, it became clear that a new finance system was needed. “We work across multiple sectors and geographies,” explains Luke Varda, the firm’s Financial Director. “Our clients share a desire to use consultative facilitation to achieve goals such as cultural change and to improve leadership and strategy.” Consequently, the firm’s clients range from multinationals with tens of thousands of staff at multiple locations around the world, to start-ups operating from a single site. The Facilitation Partnership, therefore, has team members and offices in many parts of the world.

According to the company’s Director, Ben Robinson, this agile business form made Sage a good fit for The Facilitation Partnership from the outset. “Not only did we need accounting software that was reliable, easy to use and affordable, more than that, we needed an operating system for the business,” he adds. In other words, The Facilitation Partnership needed a system that would not only automate daily accounting tasks and keep appropriate records, but also generate the type of real-time business information the firm needed to make the best decisions and investments. Due to the dispersed nature of the business, it also had to work across time zones and currencies and be scalable enough to grow with the firm. The Facilitation Partnership’s accountants recommended Sage Accounting.

### **A single source of truth**

The Facilitation Partnership invested in Sage Accounting and immediately found it easy to implement and use. “We started off using Sage Accounting to expedite day-to-day accounting tasks like invoicing, and link directly to our bank account and accountant,” says Luke. The company’s accountants use Sage to prepare the accounts, and Sage Accounting records all information and documentation (such as receipts and notes to explain any anomalies). As a result, the number of incoming enquiries from the accountant has dropped by around 50%. What is more, managers at the company estimate a saving of around 30% in accounting fees.

The Facilitation Partnership found that Sage soon became much more than an accounting package. “Sage Accounting has become our business operating system and, because it’s in the cloud, it gives us real-time data; a snapshot of the business whenever we need it,” says Luke.

He notes the importance of having a shared, single version of the truth — especially in a dispersed company. “Sage has changed our management of the business from a month-to-month outlook to a more agile, day-to-day, outlook,” Luke explains.



The Facilitation Partnership now manages its business on a real-time basis.

### **Better data, better decisions**

Consequently, The Facilitation Partnership now manages its business on a real-time basis – which has tangible effects on the firm’s operations. With the real-time data provided by Sage, the leadership team can make better decisions and investments, and payment schedules and invoicing can be optimised.

“As a team of directors, we are able to make the right decision at the right time knowing what is coming down the line in terms of the pipeline, and what money is due in when,” says Ben.

Luke also appreciates the time saved. “We used to spend a couple of hours sourcing information for weekly business meetings; now it takes us 15 minutes,” he says. Overall, the firm saves five or six working days per year purely through time saved in preparing reports and spreadsheets for meetings – because Sage does the work at the touch of a button.

Accurate, constantly-available data – for example, the ability to see quickly and easily which invoices are overdue or about to become so – has also allowed the team to create proactive office processes to deal with issues in a timely way and improve cash flow.

The Facilitation Partnership has put the time freed up by Sage Accounting to good use. “We use the additional time on activities to grow the business,” Ben explains. “For example, we want to expand into new territories.”

### **Sage scales with the business**

Luke and Ben agree that ongoing updates to Sage Accounting have mirrored and supported The Facilitation Partnership’s own development. Ben found the addition of reporting updates very helpful because they allowed the firm to see its pipeline in advance, while Luke cites Sage’s introduction of multi-currency functionality, which facilitates transactions across currencies and calculates exchange rates automatically.

“When Sage brought in multi-currency, that was great for us,” Luke says. “We work in lots of different places, and it didn’t make sense for our office in Greece to be invoicing a Greek client in pounds sterling. Now, it is very straightforward for us to issue invoices in Euros, which looks better for us and makes life easier all round.”



“Sage optimises our insight and data visibility, and in doing so has boosted our potential for growth.”

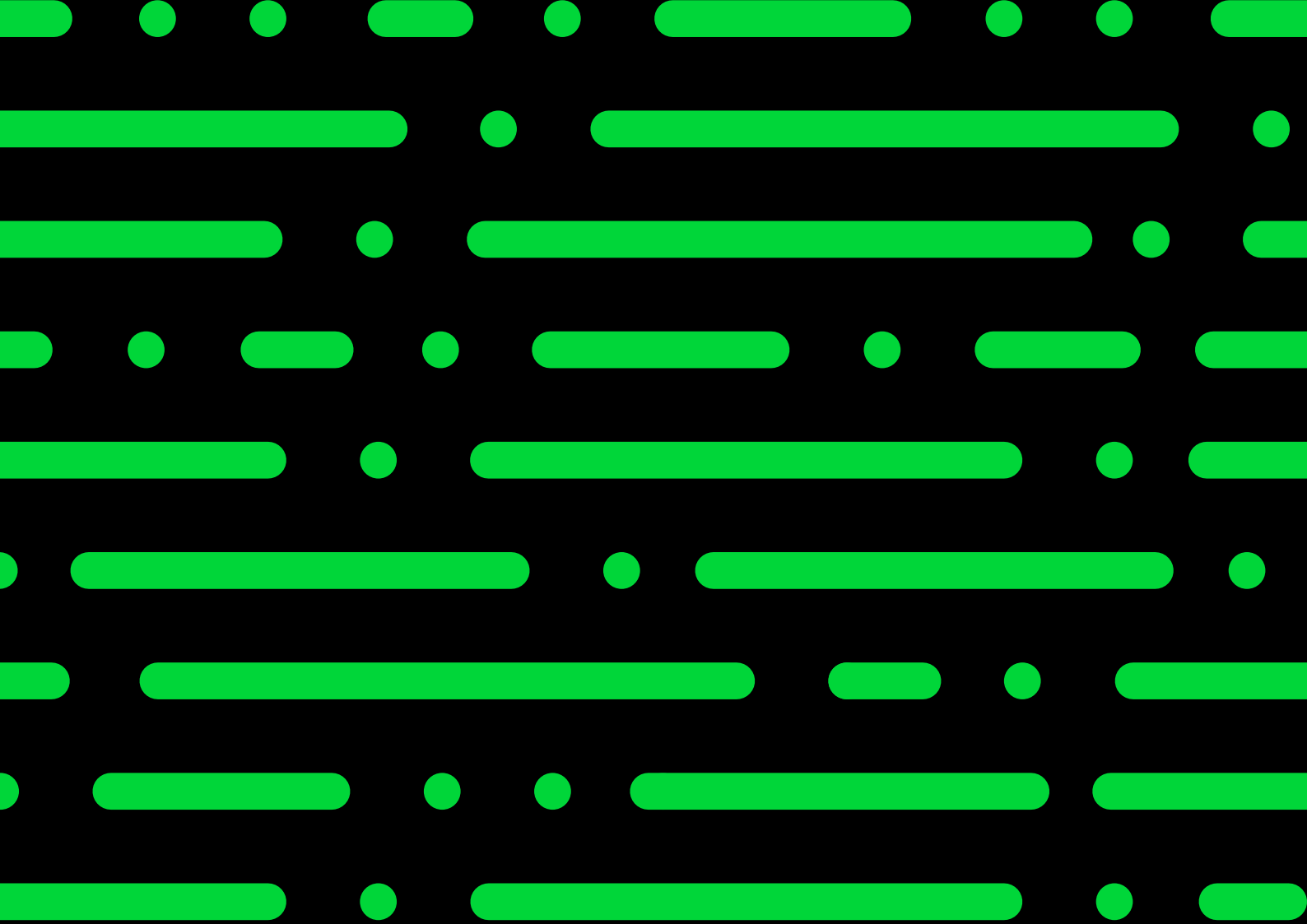
**Luke Varda**

Financial Director, The Facilitation Partnership

#### **Fit for the future**

Looking ahead, The Facilitation Partnership recognises that business and working practices are changing, and that the firm may have to pivot operations as demand grows for online facilitation, a mixture of online and offline provision, or for training clients to facilitate meetings themselves. The intention is to grow and expand the business over the next few years by responding in an agile way to market demands and through expansion in regions such as Asia and the Americas.

The scalability and ongoing development of Sage has supported The Facilitation Partnership’s year-on-year organic growth and now underpins its plans for further expansion. As Luke puts it: “Sage optimises our insight and data visibility, and in doing so has boosted our potential for growth.”



Sage

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