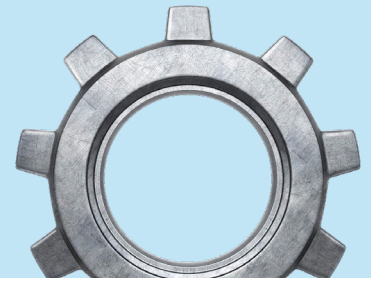# Intelligent use of ERP increases finance efficiency and productivity

Middlesbrough Council

Forward-thinking, future-proof finance system empowered by Unit4

Complete, unified data helps Middlesbrough Council deliver best-value public services in the face of austerity and ever-increasing scrutiny and regulation. Fast, flexible, and easy-to-use, Unit4 has enabled Middlesbrough Council to boost finance efficiency and productivity significantly. Meanwhile, collaborative, expert Unit4 Professional Services met an aggressive seven-month deployment schedule, delivering improved time to value after implementation.

Key benefits include:

- Increased finance management efficiency
- Streamlined and integrated Proactis invoice capture process
- Completed deployment on-time and on-budget with most ERP processes working 'out-of-the-box'
- Successful collaboration with other local councils

Empowering decision makers with financial insight they can act upon

Middlesbrough Council is a unitary authority and borough council providing public services to residents, businesses, and visitors in the Tees Valley region of the North East of England.

A drive to deliver modern, flexible services, digital transformation, and cope with a decade of public services austerity has put financial management at the forefront of Middlesbrough Council's thinking. "Our financial focus is on meeting our residents and service users' needs as efficiently as possible, while exploring innovative new ways to deliver digital services," says Justin Weston, Chief Accountant. "We manage the present day while keeping our eyes firmly on the future."

With this in mind, Middlesbrough deployed a Unit4 enterprise resource planning (ERP) system replacing a legacy SAP implementation. "The contract was awarded through the Government's G-Cloud procurement framework," Justin explains. "Unit4 offers Middlesbrough subscription-based cloud flexibility, ease-of-use, and the rich functionality we need to meet fast-changing public needs. Unit4 also has a proven track record in helping local authorities like Middlesbrough meet their financial and other goals."

Industry
Public sector local authority

Location
Middlesbrough, UK

Size
Supports approximately 140,000 residents

Product
Unit4 Enterprise Resource Planning (ERP)

Challenges

Enabled the council to streamline and automate end-to-end financial processes, creating timely, trusted data and freeing resources to focus on strategic decision-making.

Key metrics

Increase in finance productivity and efficiency

7 months Unit4 Professional Services met aggressive launch schedule

---

UNIT4
In business for people

"I can't underestimate the value that Unit4 Professional Services provides. They understood our objectives and worked as a team, bringing their public sector knowledge and experience to bear, and helping the council achieve its goals on time and on budget."

Justin Weston
Chief Accountant, Middlesbrough Council

The Unit4 ERP solution provides out-of-the-box, unified financial management, ranging from general ledger and accounts payable/receivable, to procurement and income management. "There's no fiddly customization with Unit4; almost all the financial processes are available as pre-packaged services. They're complete, intuitive, and easy to use," says Justin.

One of the council's finance management goals is to give budget managers across the council more control and accountability for how, when, and where they procure products and services and spend their money. By automating finance processes such as procurement with Unit4 and moving their day-to-day management to the front-line, the finance team are eliminating repetitive, manual tasks while simultaneously freeing up time to concentrate on strategic financial processes, like analysis and reporting.

Joan French, Unit4 Support Officer at the council, explains how it works. "Our budget stakeholders rely on the Unit4 ERP platform to perform multiple self-service financial tasks, such as raising orders and invoices — vastly improving efficiency. Financial reporting also enables both the budget managers and our finance team to keep accurate track of spend, prevent budget overruns, and maintain control. It's become part of their routine activity."

Increased finance function productivity using the ERP system

Through devolving everyday financial tasks to budget managers, the function has seen a dramatic increase in efficiency. "By automating tasks and shifting procurement processes across to line managers with Unit4, Middlesbrough Council has increased finance productivity significantly. At the same time, we are maintaining fast, complete strategic oversight," says Joan.

This transformation also extends to invoice processing. Seamless integration between Unit4 and a Proactis platform automates the capture of all invoices. The unified system converts paper and PDF-based invoices into electronic invoices and validates their accuracy by checking for a purchase order (PO), duplicates, and a valid supplier. The system then transfers the invoices for matching and payment approval.

Justin explains how it works. "When any type of invoice is received by the Central Payments team — paper, pdf, or eInvoice — Proactis matches it with the PO and attaches a copy of the invoice to the transactional record. It's visible to everyone — and of course completely automated. We have complete monitoring and control over spend."

Unit4 Professional Services goes the extra mile

The initial implementation was achieved on an aggressive, seven-month schedule. The coordinated Unit4 team, including Account Management and Professional Services, worked as one to meet this punishing deadline.

"I can't underestimate the value that Unit4 Professional Services provides," says Justin. "From the outset, they understood our objectives and collaborated closely with our team to ensure a fast, effective deployment. They worked as a team, bringing their public sector knowledge and experience to bear, and helping the council achieve its goals on time and on budget. The Unit4 system design helped too: most finance processes are being used straight out-of-the-box with minimal change and are incredibly intuitive and easy to understand."

Justin and his team have recently migrated to the Microsoft Azure Cloud 2.0, making it easier than ever to build high quality Unit4 services. "Our first step was to launch Unit4 in the cloud, which helped accelerate the deployment and save a dramatic amount of time, investment, and resources. Azure 2.0 will add even more resilience, performance, and usability."

News of the success of this Unit4 strategy has spread to other councils: neighboring Tees Valley Council has also standardized on the Unit4 ERP platform. "They came to the same conclusion we did," says Justin. "Modern finance operating models need to make self-service become the norm. The cloud-based Unit4 platform is ideally suited to this, providing powerful financial processes which will facilitate transformation. And, as we encounter change, Unit4 also has the flexibility to support adjustments in our strategy."

UNIT4
In business for people