TES

Reall
A HOME FOR HUMAN POTENTIAL

Case Study

Charity expertise and tailored solutions empower Reall

"You came across as an organisation that wanted to **step in and help,** rather than one that just wanted our money."

Reall

> **Reall is an international development organisation, who work with partners across Africa and Asia to address the global housing crisis. They provide innovative solutions and financing mechanisms to help people in poverty access affordable and sustainable housing. Reall's mission is to create resilient communities and improve the quality of life for individuals and families around the world.**

When they started to outgrow their incumbent finance system, Reall chose Business Central as their preferred finance solution. However, their chosen software partner didn't really understand Reall's specific needs nor the charity sector as a whole.

Implementing BC became a long and challenging process, as the partner showed little understanding or interest in the complexities that Reall face, such as recording of grants, different currencies, loans, foreign exchange losses and the subsequent reporting to their funders.

With their support contract coming to an end, Reall started to search for a new partner that would understand their language and culture and showed a real investment in the charity sector.

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Empowering growth, clarity, and efficiency is **our passion.**

One mission. One platform. One partner.

How Reall and TES came to work together

They sought assistance from the Software Advisory Service (now: YourShortlist). Through this service, they received a couple of partner recommendations, including TES, which is how we were included in their procurement exercise. From the outset, the team at Reall sensed that TES had a genuine interest in ensuring BC aligned with how Reall needed Business Central to work. While TES wasn't the cheapest, we certainly weren't the most expensive either, and for Reall, it's all about the value a system and a partner can bring to the charity.

The procurement process for Reall's BC implementation followed a thorough tender process. While Reall initially sought three responses, they ended up receiving five proposals. The scoring mechanism in place ensured an impartial evaluation, so that no favouritism is involved. For Reall, the system's potential value outweighed cost considerations.

As part of the tender process a couple of in-person meetings took place, providing a chance to look people in the eye "over a coffee and a decent packet of biscuits". TES came well-prepared, armed with lots of questions that showcased their genuine interest in Reall's organisation, which made a huge difference. It was obvious right from the start that TES wanted to help Reall.

After careful evaluation, TES were selected as the software partner for Reall's BC implementation. From Reall's perspective, the migration process was smooth on TES' part, despite some complexities arising from the previous partner's handling of licenses. TES' Customer Success Manager regularly touches base, not necessarily to try and sell anything, but she always checks in how things are going and how TES can do better, how TES can help Reall even more, and make things better than they already are.

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Get stuff done

The relationship between Reall and TES is characterised by an easy-going and friendly relationship, while "getting stuff done". This is not only true for the conversations with the Customer Success Manager, but also the Managed Services team are very quick to respond and solve any issues Reall might have. The team are happy to help, even if it's a 'how do I do [x] again, I forgot?'. For any issue, big or small, you send the support team an email, they will set up a call, and they will sort it out. Reall feels that they are always treated with respect and that no question is 'daft'.

The key differentiating factor in Reall's BC implementation, compared to the previous set-up, was the introduction of TES's NFP (Not-For-Profit) pack. This pack, designed by TES specifically for the charity sector, shows TES' commitment to enhance the usability of Business Central even further, specifically for the charity sector in the UK.
With charities often having limited resources in-house, it is great to have a solution that makes lives of charity finance people easier because it was designed with charities in mind.

In addition to the NFP pack, certain configuration differences had a significant impact on Reall's operations. One notable improvement was the newfound ability for budget holders to access and view their budgets. Previously, this visibility was limited and processes were disjointed and interrupted. With the configuration expertise from TES' consultants, budget holders gained transparency and control over their budgets, leading to better financial management and decision-making because processes "just slotted together".

Other key improvements were:

Responsive and attentive support
TES's team actively listened to Reall's concerns and challenges. One specific example was the resolution of payment run issues. Reall had been doing manual individual payments to suppliers for 12 months because they had lost confidence in Business Central and the way it was set up. TES addressed and resolved these problems, making Business Central 'just work'.

Time savings
The efficient set-up and configuration enabled Reall to save valuable time because the system did what it needed to do. Payment runs were working, budgets were visible to budget holders – while these things seem small, it becomes incredibly time-wasting if it needs to be done manually.

Enhanced system understanding and ownership
Through comprehensive training and guidance provided by TES, Reall now possesses a deep understanding of the BC system. This empowered Reall's staff with product ownership, enabling them to handle tasks independently. TES continues to serve as a safety net, offering support and guidance when needed.

These improvements have equipped Reall with the necessary knowledge, confidence, and control over their BC system, enabling them to manage their operations effectively and independently, while TES remains a trusted partner for ongoing support and assistance.

Understanding is everything

Reall's feedback was that the training they received from TES was superb, with consultants who knew how to teach people the ropes of using the system. The consultants were able to provide different ways of doing the same thing, to enable the Reall staff to decide what worked best for them and their processes, building their confidence in the system and in themselves as users of the system. So not only did the consultant understand charity finance, but they also tried to understand Reall's financial and operational processes, in order to empower the Reall team to understand their finance system.

> We don't have BC expertise in house, so we don't know what we don't know.

> The in-depth charity knowledge brought an extra dimension to what TES was able to offer us.

The most significant distinction between the previous partner and TES lies in TES' focus on what does this organisation needs and how can TES help them, rather than 'let's see how much we can sell them'. In the end, a charity needs to be able to do what they need to do, without any unnecessary bells and whistles. TES' profound understanding of Reall's business and their commitment to looking for solutions that make the lives of the people at Reall better is a huge differentiator. TES showed a real interest in knowing who Reall are, what they do and how they do it, as well as who the people in Reall are who will be using the system. This level of comprehension, combined with charity finance expertise, proved crucial for the successful implementation and ongoing support of a finance system like BC.

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Find yourself the right partner

For those considering a switch in software partners, Reall advises: "Don't be frightened by moving, but take the time to find yourself the right partner". The experience of Reall demonstrates the importance of finding a partner who not only possesses the technical expertise but also takes the time to truly comprehend the unique aspects of an organisation. A seamless transition to a new partner can lead to significant improvements and unlock untapped potential.

> Don't be frightened by moving, but take the time to find yourself **the right partner**.

In summary, Reall's journey with TES shows the value of partnering with a supplier who understands the organisation, delves into its intricacies, and builds strong relationships. By embracing change and choosing the right partner, charities can unlock new opportunities for growth and success.

TES. Technology Enabling Social Impact

TES has developed an extensive understanding of the pains commonly associated with the processes and systems adopted by charities. Long-standing engagements within the sector gives TES a leading edge as a UK Microsoft partner.

Total Enterprise Solutions
Grosvenor Court, Wheelhouse Road,
Lea Hall Enterprise Park, Rugeley
WS15 1LH

Enquiries: 0345 257 1173

Support: 0345 257 8241

totalenterprisesolutions.co.uk