

The logo for 'datel' is a red square with the word 'datel' in white lowercase letters.

expanding the  
world of sage

## ► Customer Review

GL Education Group Limited

*"We sell to at least half the schools in the UK annually – that's around 16,000 schools – so we collect and analyse vast amounts of data. We now have greater business insight and more flexible analysis with Sage X3 to see what's going on, compared with when using SAP Business One"*

**Rob Dargue**  
Chief Financial Officer  
GL Education Group Limited



GL Education Group is the UK's leading provider of formative assessments for schools. The company's assessments have been widely used by education, health and psychology professionals for over 30 years. More than 3 million pupils in UK primary and secondary schools take its tests every year and it has delivered over 7 million online tests to children worldwide.

Financial Director Rob Dargue looks at some of the drivers for moving to Sage X3 platform and how the system, implemented by Datel, is now supporting the group's growing business.

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**Chief Financial Officer**  
**GL Education Group**  
**Limited**

***Can you outline the systems on which you previously relied to manage distribution and finance?***

Until late 2014, we operated with two separate systems: FileMaker Pro for distribution and SAP Business One for finance. While these had stood us in good stead for several years, we'd reached the point where they could no longer support our growing, successful business.

In particular, as we'd heavily customised FileMaker Pro over time, upgrades were more difficult and we were dependent on one person within our organisation for technical assistance. Furthermore, increasing system instability meant that sometimes we couldn't take orders for three to four hours.

The two systems were not integrated. Data had to be manually transferred from one to the other, duplicating effort.

***What business pains did this create?***

It made month ends challenging, with a lot of reconciliation work needing to be done on sales, VAT, debtors, stock and so on. Day-to-day reporting, such as knowing how many sales orders we'd taken, was

also a problem. Running a report involved extracting data from FileMaker Pro, loading it into Microsoft Access and reconciling the database – all of which naturally introduced a delay before we could use the information.

The time had come to rethink our software platform.

***How did you tackle the challenge of finding a solution – and a partner – to help take your business into the future?***

As the transition would be a big step for us, we involved one of the major consultancies to advise us on the selection process; they narrowed the field down to Sage X3 and Microsoft Dynamics NAV. We chose Sage X3 as having the better fit and offering greater flexibility to cope with the nuances of our business.

They also drew up a shortlist of go-to suppliers, one of whom was Datel. Datel seemed to have a collaborative approach and nothing was too much trouble for them. They recognised that, for good governance, I would need absolute clarity of what would be delivered, the cost and timescales, and suggested that we undertake pre-scoping workshops.

By the end, I could confidently go back to the board with a hundred-page document mapping our business processes and defining our requirements for Sage X3, with any bespoke work clearly costed out. It was evident that Datel had done this exercise before.

The workshops also helped us to change our mindset. We took a fresh look at the way we worked and explored how the functionality within Sage X3 could take our business forward.

We decided to implement Sage X3 Quick Start, which brought the advantages of a quick-start methodology, combined with tailoring to our business by Datel.

One example of the customisation we required was in the area of royalties. We pay royalties to as many as six different authors and publishers for each testing product that we market. We needed the system to reserve in the general ledger the correct percentages due, raise the payments and also help us to report back half-yearly to our authors. Datel did a nice piece of work for us on this.

We were also pleased with the data conversion that we asked Datel to do for us – it was huge task.

For a large-scale project like this, we felt it was important to bring in a dedicated project manager. By the time the system went live in November 2014, we'd done a lot of testing, so we could use our assigned Datel resource to fix any niggles and enhance the system by developing reports and dashboards. Our CEO commented that he had never seen such a smooth implementation of an ERP system.

***It's still early days, but what business benefits have you experienced so far?***

Sage X3 makes it easier to manage our business and the people in it. Whereas previously month end used to be a struggle, we now have confidence in the system, while integrating both parts of our business – finance and distribution – means we can trust the postings. Month end close down is much faster and it's also become much easier to analyse trends and patterns in our business.

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One of Sage X3 differentiators was its ease of use and our users took to it very well indeed. Sales order processing, customer

service, stock management, cash control, credit control and finance were quickly up and running and around half of our 200-strong team now uses the system.

Sage X3's ability to present information graphically as dashboards with workflows makes it easier to bring new people on board, and improves consistency. Rather than having to navigate labyrinthine processes, they are guided through the next steps.

***How are you rolling out Sage X3 into the rest of your operations?***

A good example of how Sage X3 can link to our existing line-of-business applications is its integration with our education-specific customer relationship management system. Daily transactions flow out of Sage through to CRM; so when our sales teams go into a customer's account, they can view a rounded, up-to-date picture of all financial transactions.

Over the next twelve months, Datel will be linking Sage with our assessment engine, which holds data on the tests that customers have used. For new accounts, we'll be able to automatically populate the assessment engine with the information that has been set up on Sage X3 – a task that is performed manually at present – saving even more time. Conversely, the data on the assessment engine will be combined with that held on CRM and Sage X3 to arm our renewals team in Swindon with powerful information. They'll have all the details about the relationship with the customer at their fingertips via a dashboard .

These are really important developments for us as they increase

efficiency and productivity. It's not about cutting staff but about offering our customers great service while helping us to sell and market the business better.

***What plans do you have for developing your Sage X3 solution in the future?***

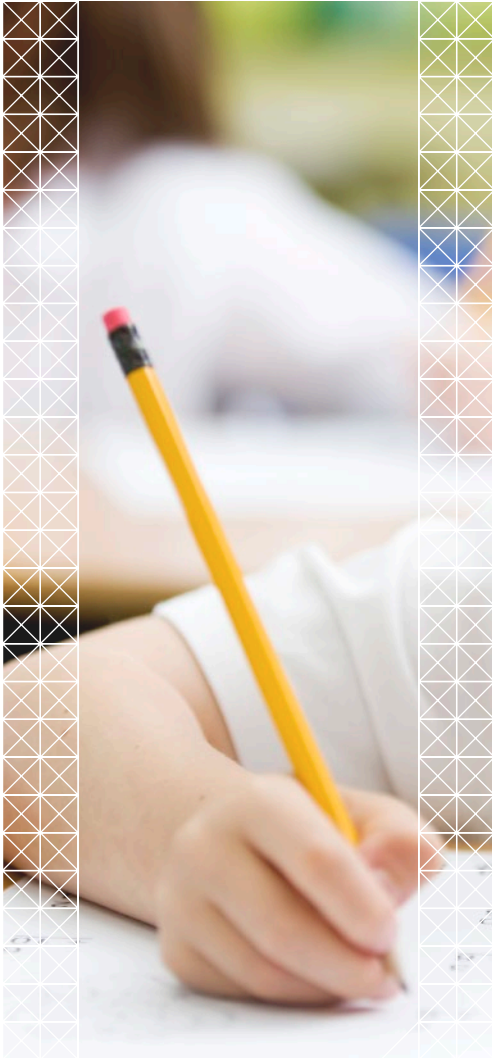
The collaboration with Datel continues. We've recently added Sage Enterprise Intelligence, which combines business intelligence with Microsoft Excel reporting. This will bring fast, efficient management reporting and equip the business with up-to-the-minute data.

Another development is to provide pop-ups to prompt our order-taking team to cross-sell and up-sell by suggesting a new product to the customer, based on their buying history. This will turn order taking into a proactive revenue-earner. Moreover, with the trend to online testing, we can encourage our customers to consider our digital products as an alternative delivery method.

We're looking to bring financial information from our two software studios in the North East into Sage X3, further strengthening our control of the wider business. There's also the possibility of integrating HR and we're considering adopting Datel's Rapid Order Entry solution.

So, as you can see, we're going to be relying a great deal on Sage X3 and Datel to support our ambitions for growth, both in the UK and around the world, in the months and years ahead.





## Datel – Expanding the world of Sage

Established in 1981, Datel has grown to be the largest Sage Strategic Partner in the UK. Over 160 people at our Warrington headquarters and in our Leeds and London offices look after more than 1,000 customers in sectors ranging from food & drink to pharmaceuticals, telecoms to travel.

We deliver integrated solutions that unify data from every corner of the business. We help our customers to strengthen their management control and compete effectively in today's global markets. ISO 9001:2008 accredited, we have one of the industry's most experienced implementation teams who apply our tried and tested methodology to complete projects on time and to budget.

Customers benefit from our expertise and accreditations to keep their Sage 200, Sage 1000 or Sage X3 solution closely aligned with their evolving business. They are also able to draw on our Fusion suite of software products that complement and expand the core Sage functionality.

Customers appreciate our consultative, listening approach, as we take time to understand their business and invest in the relationship with them. They value our exceptional transparency; for example, up-to-date statistics on customers' satisfaction with our Support team are posted on our website.

No one knows Sage better than Datel. Our readiness to invest in our people and our commitment to excellence have netted us numerous Sage and industry awards and we're justifiably proud of our contribution to the wider Sage community. To find out more about our products and services, visit our website at [www.datel.info](http://www.datel.info).

## Key benefits of Sage X3 for GL Education Limited:

- ▶ A single system that integrates distribution and finance data and links to existing line-of-business applications
- ▶ Flexibility to evolve with changing company requirements
- ▶ Dashboards and workflows ensure business processes are carried out efficiently and consistently
- ▶ Screen prompts help telesales teams to recommend additional products
- ▶ Expert scoping, implementation and customisation by Datel

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**datel**

- ▶ [www.datel.info](http://www.datel.info)
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