



CASE STUDY

# ActionAid streamlines processes and data with Infor SunSystems Cloud Edition

ActionAid is an international charity for women and girls living in poverty and is active in 46 countries. The charity works in rural and urban communities across Africa, Asia and Latin America, every day, all year round, as well as responding to emergency situations arising from disasters or conflict.

## A five-year strategy

ActionAid's operational structure is complex. Comprised of fundraising countries, implementation countries, and a global secretariat based in South Africa, its accounting systems were previously disparate with many regions reliant upon inefficient, paper-based processes. Such an approach inevitably posed the risk of inaccuracies and impeded data availability for reporting.



### Countries in operation

46

### Industry

Charity

### Infor product

Infor SunSystems®  
Infor® OS

### Website

[actionaid.org](http://actionaid.org)

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**JOHN BROPHY**

Head of Finance Transformation, ActionAid

As part of a five-year strategy launched in 2017, ActionAid commenced a digital transformation program designed to drive best practices across its financials, increase transparency to its stakeholders, and maximise efficiency. The first stages of this initiative were to review existing infrastructure and identify a number of key goals for the project.

The team concluded that a modern, cloud-based platform was required, which could underpin global consolidation of all of its financials across the organisation including the general secretariat, fundraising, and implementation countries using a global financial system (GFS).

Crucially, the system needed to standardise processes and data for consistency and to reduce training needs, provide multi-currency capabilities, and have the capacity to be configured to support local regulatory and taxation requirements and nuances.

## Stepping up to the challenge

Following the review, ActionAid selected Infor® SunSystems Cloud Edition, including Infor OS (Operating Service), which provides a standard technology framework for workflow, document management, and more—all delivered via the cloud. The decision was based on an existing relationship with Infor spanning many years as well as a thorough evaluation of SunSystems' capabilities against the organisation's digital transformation goals. A cloud model was identified as key to facilitating consistency and speed across every territory, minimising overheads, and instilling the scale to support future change.

## A harmonised approach

Following an initial pilot, which focused on the general secretariat in South Africa and three other countries, the team identified key requirements and objectives for the deployment, after which a detailed deployment plan and process was completed before the global roll out began in 2018.

Focused on streamlining and harmonising processes, the objectives of the design phase were defined across a number of areas and included data improvement, better ways of working, reduced costs, reduced reporting time, and increased funding.

## Business challenges

- Disparate accounting systems
- Inefficient paper-based processes for many regions
- Lack of consistency across territory
- Need to improve data management and reporting time
- High costs

## Reducing costs, increasing transparency, and empowering business partners

Currently just over halfway through the deployment, with 180 users, ActionAid is already starting to see significant benefits.

The core data model established in the design phase has enabled consistency of information in the GFS, while Infor's cloud model has established a platform from which to enable finance staff to step-up to business partnering roles.

"The costs savings we anticipate as a result of the deployment are important, but more important is enabling our finance teams to become business partners and add value across the organisation. We are also in a stronger position to implement a shared financial services model with our cloud platform and common data model processes as a foundation," comments John Brophy, Head of Finance Transformation at ActionAid. Through lowering support costs, the potential exists to invest a higher proportion of investment or donations into programmes and campaigns.

"As well as maximising funds, being accountable to and demonstrating transparency amongst our stakeholders is a fundamental principle for ActionAid. Infor SunSystems facilitates this transparency, and the ease at which financial data can be processed and viewed allows us to quickly collate reports and providing robust communications to our community," he continues.

One aspect in particular, which has proved pivotal to this end, is the funding source code. Created in the design phase of the project, this code enables income to be tracked in real time within the GFS, allowing ActionAid to identify spending against donor budget lines, and report back to donors on how their monies have been used. For example, Government and EU grants need to be coded in a different way than the Disasters and Emergencies Commission (DEC), and separated from non-profit organisations and Trusts, such as The National Lottery.

This granular insight means that trustees can demonstrate the ways in which funds from a donor have been spent following a major event, or the extent to which regular appeal funds have supported success against a particular project.

“In any charity activity, trust is imperative, and this means being completely transparent about how and where every penny is spent, in a clear, concise manner,” comments Jason Hier, GFS Project Manager, ActionAid. “Through establishing this trusted relationship with our stakeholders, our supporters can see the positive impact resulting from their donations and helps us to make more informed decisions on future activity.”

## Improved confidence and communications

“As well as more streamlined, standardised, and available data, we are now able to generate our management accounts in less than half the time it took previously,” he adds.

“The system is easy to use, reports are straightforward to create, and we’ve seen a real boost in both confidence within the finance function, as well as improved communications across the organisation as a whole.

## Business results

- Streamlined and harmonised processes
- Support for local regulatory and taxation requirements and nuances
- Transparency amongst stakeholders who can track results from their donations
- Lower support costs
- A modern, cloud-based platform to facilitate future change

The ability to provide fast insights which support decision-making outside of the finance function has resulted in an improved perception of what finance represents and started to carve out a reputation for delivering business insights and value-add information, rather than number crunching.

John Brophy concludes: “Infor really has worked as a close partner and trusted advisor throughout our transformation to this point. The team’s professionalism and expertise, as well as empathy and creativity in solving some of our unique challenges, has propelled the success of this deployment, giving us a huge amount of confidence as we move forward.”

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