

Case study

Royal Automobile Association (RAA)



The Challenge

RAA was managing its finances using Masterpack, an old and inefficient system, which was difficult to use and did not offer good visibility of financial information. Only 15 employees in the finance team were able to access and understand the system, as the software was outdated and lacked a user-friendly interface.

The Solution

The association implemented TechnologyOne Financials and Enterprise Budgeting to gain better control over financial data across the nine different business units and improve visibility of, and access to, information.

The Outcome

Since implementing Financials and Enterprise Budgeting, RAA's general managers have been able to take ownership of financial information and budgets, as they are able to easily find and access data to make informed business decisions.

Additionally, with the improvement in visibility of information within Financials, RAA can share specific information with users that is most relevant to their part of the business.

With the implementation of XLOne reporting within Financials, the organisation has seen an improvement in the quality of reports. RAA is now able to maintain better business and financial reporting standards as the organisation grows and accounting standards change.

It is not only much easier to retrieve important financial data, but it gives RAA the ability to provide a lot of valuable data to the business. RAA are also now able to report the net profit in real-time on their business units, divisions and by each of their products, enabling them to focus on key areas.

Royal Automobile Association at a glance

\$200 million revenue

600,000 club members

750 staff

Established in 1903, the Royal Automobile Association (RAA) is the largest independent organisation in South Australia, with 600,000 members and 330,000 current insurance policy holders. Headquartered in Adelaide, the organisation operates seven metropolitan and 15 regional branches and agents. Functioning as a member organisation, RAA offers roadside assistance as well as motor vehicle, home and boat insurance and a wide variety of other member products and services.

Solution

TechnologyOne Financials, TechnologyOne Enterprise Budgeting and TechnologyOne XLOne.

“Financials has become an invaluable tool in collating and viewing information, as it is the last resting point of all our financial data.”

Carrie Hasler, Finance Manager

Background

RAA is dedicated to providing roadside assistance, insurance and automotive advice to its members.

The organisation decided to use TechnologyOne Financials and Enterprise Budgeting, as it required a solution that was easier to use and offered better functionality than its incumbent system.

Financials delivers organisation-wide control and integration of financial information essential to strategic decision-making and improving the bottom line.

Enterprise Budgeting allows for comprehensive budgeting to address RAA's requirements by breaking down barriers between the operational and finance sides of the business.

RAA Finance Manager, Carrie Hasler, explained the business chose to implement the TechnologyOne solutions, as the majority of the organisation could not access the incumbent system, meaning financial information was only available to a limited number of employees.

“The old system could only be understood by the finance team, which consists of 15 people. We were looking for a solution that could be used by anyone across the organisation, especially the managers,” Ms Hasler said.

“Now with Financials and Enterprise Budgeting, we have around 65 users and all of the general managers have access to the solution, so they can easily see the financial data relevant to their particular business unit. It saves time as they do not have to ask the finance team to retrieve it for them, and makes them more productive.

“After setting up the systems for the RAA Club, we then implemented for RAA Insurance, so our Group is fully integrated.”

Gain control of business information

With RAA operating a number of systems, TechnologyOne Financials was also required to integrate with multiple sources of information from the nine separate business units.

“Financials has become an invaluable tool in collating and viewing information, as it is the last resting point of all our financial data. This means everything is in one place and can be easily accessed and viewed by employees. People can target the relevant information, as they no longer have to go searching across the separate systems to find data,” said Ms Hasler.

Reporting standards have also improved with the use of XLOne, as the system is able to support and maintain reports as the organisation changes.

“Having a system that can meet our needs and any financial changes is extremely important. It means that if we have a business unit with a certain number of expenses, and one of those expenses grows or changes, we have the ability to adapt and alter the focus of our reports,” Ms Hasler said.

The TechnologyOne solutions have also helped improve RAA's business practices, as end-of-month processes are significantly more efficient due to streamlined data access and analysis.

The fact TechnologyOne is based in Australia also influenced RAA's decision to implement Financials and Enterprise Budgeting.

“Being able to meet with representatives and easily contact software advice over the phone gave us the peace of mind our solutions would have excellent local support,” Ms Hasler explained.

About TechnologyOne

TechnologyOne (ASX:TNE) is one of Australia's largest publicly listed software companies, with offices across six countries including each state and territory of Australia, as well as New Zealand, the South Pacific, Asia and the United Kingdom. For 25 years, we have been providing powerful and deeply integrated enterprise software solutions that are used every day by more than 800 leading corporations, government departments and statutory authorities.

TechnologyOne's mission is to provide our customers with solutions that transform their business and make their working life simple. We do this by embracing new technologies, building innovative products and delivering outstanding services. Our philosophy is to ensure simplicity for our customers by providing deeply integrated enterprise software that is incredibly easy to use, yet powerful. We are focused on participating in only seven key markets; government, local government, financial services, education, health and community services, utilities and managed services. With our commitment to these key markets we develop, market, sell, implement and support preconfigured enterprise software solutions with the TechnologyOne difference - the Power of One - One Vision. One Vendor. One Experience.

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