

The Westmorland Family and Unit4 Dream

With Unit4 Dream, Westmorland has been able to transform its financial management processes, save time and money, improve the accuracy and speed of production of management accounts and boost staff morale.

Key facts

- **Sector** – Commercial sector
- **Solution** – built on Windows technology, the Unit4 Dream accounting solution offers commercial sector customers multi-company and multi-currency capabilities, powerful user-defined input and a flexible accounting structure in a unified ledger. Combined with strong integration capabilities, Unit4 Dream has a logical design which is remarkably easy to implement and use. With Dream, organisations feel in control of their finances.
- **Region** – UKI
- **Revenue** – c. £70m per annum
- **Customer since** – c. 2000
- **Employees** – c. 1,000

Value overview

Westmorland has been a happy customer of Dream for many years, and upgrading to the most recent version has allowed the business to make further efficiency improvements. Indeed, the team commented that since the upgrade they have noted significant improvements in the accuracy and efficacy of its management account preparation, its purchase and sales ledgers and staff expenses processes. They estimate that they have achieved a 40% improvement in purchase ledger efficiency alone, which has been possible through smarter working and the automation of previously manual processes. Invoices are also being emailed, which has reduced costs even further and the team finds the self-service nature of the solution highly beneficial, as they can make system changes themselves quickly and with minimal disruption to the business.



The situation

Founded over forty years ago, Westmorland has expanded on its successful farming heritage to become the owner of the only family-run motorway service stations in the UK. Among its key operations are the Tebay and Gloucester motorway services, as well as the J38 truck stop and Cairn Lodge services.

Westmorland was experiencing rapid growth across its operations and recognised that it had outgrown its current solution. So it began to look to upgrade the structure of its finance department in order to keep up with the rapid change it was experiencing.

The needs

Westmorland sought a more robust, future-proofed platform, which could: transform its financial management systems; improve transparency and accuracy of its reporting; and remove the reliance on manual processes, thereby freeing up staff time to focus on more strategic analysis of data. The team found that solution in the latest version of Unit4 Dream.

Without upgrading, the ability to deliver comprehensive, accurate and timely financial and operational management information to support the current and forecast business growth would have been more problematic and challenging for the Westmorland team. This would have affected the business' ability to make the informed financial and operational decisions necessary to support continued business growth, as well as helping to build on Westmorland's competitive position.

In addition, Westmorland recognises the importance of keeping up to date with the latest technological developments from Dream, which has enabled – and will continue to enable – the team to enhance and extend the business' use of other back-office solutions.

The solution

In updating to a newer version of Dream, Westmorland has access to the breadth of functionality it needs to achieve its strategic objectives, while also allowing the business to improve the efficiency and scope of its financial management processes further. In addition, the upgrade ensures both that the business' current pace of change and growth will remain successful and sustainable and also that Westmorland will be able to meet its ambitious growth objectives in the future.

Unit4 played a pivotal role in ensuring Westmorland achieved all of its objectives from the upgrade process. The teams worked together to scope the project and undertook an extensive solution optimisation review, which identified further enhancements to the system that would extend the benefits on offer to Westmorland. Indeed, Westmorland has commented on the rapid return on investment, the smooth transition to the new version, minimal disruption to the business and significant efficiency and process gains to the business as a whole.

The benefits

The Westmorland Finance team has been able to improve the efficiency of the whole finance department, which has saved the business both time and money.

Among the most notable efficiency gains has been that seen in the removal of the huge purchase ledger administrative burden. So, for example, the team processed c70,000 invoices per year and with the automation offered by Dream the team no longer needed to scan anywhere near the same volume of invoices. Indeed, the team estimates that it has seen

a 40% improvement in purchase ledger efficiency, through smarter working and automating manual processes. This saving of time frees the finance team up, to focus on more strategic analysis and adding value to the wider business. This time-saving benefit is enhanced further by a reduced cost per invoice as invoices are emailed.



In addition, thanks to streamlining and automating key finance processes, the production and quality of management reporting has been improved significantly. The team can produce management reports quickly and are confident that the data is comprehensive and accurate, which has played a part in improving decision-making processes and efficiency.

The solution itself has proven highly intuitive, which has helped with user acceptance and adoption. The Finance team are impressed with the system's ability to remove many of the manual processes that were dominating their daily and weekly routines.

The Westmorland Family



“ We have not looked back since we upgraded our Unit4 Dream solution. So we were confident that we would be able to achieve even greater things after our upgrade. The technical expertise and experience from Unit4 was essential in enabling us to unlock the full potential of the Dream software and we have realised significant efficiency savings across our Finance department as a result. The upgrade and associated improvements in core process have made a huge difference to our ways of working and we would recommend Dream to any business looking for a best-in-class finance and accounting solution.”

Dan Tomkins,
Head of Finance, Westmorland Limited.

Key outcomes

- The Unit4 team delivered hands-on support, fully understanding the business needs of both the business as a whole and every single one of Westmorland’s users.
- The level of technical expertise and knowledge of the Unit4 product is first class.
- The Unit4 team worked very well with Westmorland’s in-house and external IT support teams.
- Time to savings.
- Business continuity.
- Low total cost of ownership.
- Low total cost of change.

About Unit4

Unit4 is a leading provider of enterprise applications empowering people in service organisations. With annual revenue north of 500M Euro and more than 4,000 employees world-wide, Unit4 delivers ERP, industry-focused and best-in-class applications. Thousands of organisations from sectors including professional services, education, public services, not-for-profit, real estate, wholesale, and financial services benefit from Unit4 solutions. Unit4 is in business for people.

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