

CASE STUDY

# SAGE 200

► ROMANS GROUP

Sage Business Partner



# ROMANS GROUP MANAGES DOUBLING IN TURNOVER WITH SAGE 200



## CLIENT PROFILE

Romans Group started life in 1987 as a sales and letting business in Bracknell, Berkshire. Today, Romans is a multidisciplinary property group, offering clients a diverse range of services, including estate agency sales and lettings, auctions, financial and mortgage advice, surveying, new homes marketing, land development and town planning. In 2011, the Group won the prestigious Sunday Times awards for Estate Agency of the Year and Lettings Agency of the Year.

Romans employs around 400 staff in 24 offices, covering London, the east of England, the Home Counties and Wales. Turnover for 2012 is expected to be in the region of £28 million.





## THE CHALLENGE

From the Group's Wokingham office, Finance Director Michael Palmer explains that managing such a wide-ranging business is no small task, "We have four separately trading companies – estate agency, town planning, financial services and surveying. As the group's finance director, I have to ensure I'm fully in the picture across them all."

He adds, "The only way I can achieve this is by having easy access to costs, and away of allocating our revenues to profitcentres to identify areas of expansion. More specifically, for the consultancy areas of our business, we must also be able to closely monitor and control time and expenses against projects to ensure profit levels stay on track."

## THE SOLUTION


Romans switched to Sage a few years ago, and subsequently migrated in mid-2009 from Sage MMS with bespoke solutions to Sage 200 with Project Accounting. This solution has been driving the business ever since.

## THE BENEFITS

A flexible system for a diverse business

Romans' strategy of being prepared to invest in technology has paid off. Since Romans started using Sage, its turnover has doubled and is set to increase. Sage 200 has created a central point for monitoring money entering and leaving the firm across the entire group. Having this central access means the group is able to manage its finances more easily, while higher level management reporting gives Romans the confidence that management decisions are grounded in accurate, up-to-date information.

"Having good, solid software in place is critical and we use Sage 200 across all four of the businesses," says Michael. "The great thing about Sage 200 is its flexibility on handling different costing structures. From my experience of other reporting systems, we just wouldn't have the same level of flexibility elsewhere. It's easy to set up different businesses on the system, meaning we can have a single system holding many different formats of income and business structures."



“Romans is a dynamic company and standing still is not an option for us. Sage 200 provides us with an innovative yet stable platform for consolidating and managing our expanding business.”

**MICHAEL PALMER, FINANCE DIRECTOR**  
ROMAN GROUP'S WOKINGHAM OFFICE



## TIME IS MONEY

Michael also notes, “Sage is indispensable for our planning consultancy, Boyer Planning. The business model works by selling consultants’ time, so we’re constantly monitoring their charge rates and utilisation to check they are meeting their targets. Sage Project Accounting keeps track of all that for us and produces profit and loss reports for projects.”

He recalls, “Completing and authorising timesheets by hand for a team of 38 people used to be an extremely laborious process. There was always a time lag, too, with timesheets only being submitted at the end of the month. Now, with all time recorded through Sage Project Accounting, managers know by the Friday how staff have spent their time and can identify under-utilisation to rapidly redirect staff’s time for the following week.”

Accurate time-recording helps the business to become more profitable, too: “With streamlined time entry and authorisation, we can pick up more of staff’s time in the monthly billing cycle. As a result, we not only save time on data entry but can bill more quickly and more accurately, too.”

In a business where time is money, directors now have access to detailed reports on KPIs. Michael says that the employees, too, have gained a greater awareness of where their time has been spent: “We’ve added our own application, which encourages internal competition through a ‘traffic lights’ system, automatically drawing on the timesheet data to measure individual performance against targets. We couldn’t have done this without the foundation of the Sage project ledger.”



## PAPERLESS ACCESS TO INFORMATION

Pinnacle has been Romans' Sage Business Partner since 2007 and Michael appreciates the value they bring to the business: "Our regular quarterly meetings with Pinnacle, where we discuss our plans, have helped to build a very good working relationship. We constantly strive to improve our IT platform to make our business even more efficient. If ever we have a hurdle to overcome or a specific objective to achieve, and feel that the answer may lie in Sage, we can rely on Pinnacle to modify the system to help us. In addition, they are our eyes and ears on third-party solutions that can be integrated to solve a particular business challenge."

Michael mentions Sicon Document Management as one example of a successfully integrated third-party solution, whereby documents such as invoices, purchase orders and expenses are scanned in and linked to the underlying transactions in Sage 200.

Commenting on the improvements this has brought, Michael says, "Operational managers needing to understand a spike in costs or investigate an anomaly used to have to ask the accounts team to hunt out documents that had been filed away. Now, they have direct access to information that helps them to manage their area of the business effectively, there are measurable time-savings. By eliminating labour-intensive manual searches we save about ten minutes on every query and our accounts team are no longer distracted from their core work. Scanning in the documents is actually quicker than filing, so we save time all down the line."



## THE FUTURE

Already providing wide-ranging support, the ability of the Sage 200 solution to grow in line with the changing needs of the Romans business means that significant untapped potential remains. One planned development is automating the system for purchase order processing group-wide. As Michael observes, “Manual processes are ‘leaky’ – there’s always a risk of something being missed. By automating the workflow for purchase order authorisation, we’ll streamline and improve this process.”

Sage 200 fixed assets tracking module is also on the horizon. The module will enable Romans to report on assets by branch but with depreciation split across multiple cost centres, for example where estate agency, letting and mortgage advice services are provided from a single Romans office.

As the company prepares to celebrate its twenty-fifth year, Michael emphasises, “Romans is a dynamic company and standing still is not an option for us, especially in today’s competitive marketplace. Sage 200 provides us with an innovative yet stable platform for consolidating and managing our expanding business, while Pinnacle maximises the value of our investment as a trusted extension of our team.”



## SOLUTION OVERVIEW:

- A flexible accounting solution for a growing business
- Finance team supported in increasing efficiency and productivity
- Improved management information and control
- Seamless integration between bespoke software and Sage 200
- Opportunity to extend functionality with customer relationship management
- Professional training and support from Sage Business Partner Pinnacle Computing

## ABOUT PINNACLE

Pinnacle is a leading Sage Business Partner, providing the full range of Sage Accounting, ERP & CRM solutions. Pinnacle supplies Sage to over 1000 medium and large sized businesses from 12 offices across the UK and Ireland. Sage software provides end – to – end business management applications globally, delivering high performance, advanced functionality and cross product integration with unmatched freedom of choice. Sage provides companies with the solutions they need to enhance competitive advantage and increase profitability. With over 20 years' experience, Pinnacle has grown to become one of the foremost recognised suppliers of Sage and multiple award winners in providing its clients with local software and hardware support, consultancy, account manager.





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