



G-CLOUD 15 FRAMEWORK

LOT 3 – CLOUD SUPPORT

SERVICE DEFINITION DOCUMENT

Ion Industries Ltd

2 Esh Plaza
Sir Bobby Robson Way
Newcastle upon Tyne
NE13 9BA

Website:	www.ionhq.co.uk
Telephone:	0191 466 1231
Email:	succes@ionhq.co.uk
Company Number:	10323679

TABLE OF CONTENTS

SERVICE OVERVIEW	3
IMPLEMENTATION PROCESS	4
Delivery Process.....	4
Planning Phase.....	4
Discovery Phase	5
Implementation Phase.....	5
Training and Testing Phase	5
Final Configuration Phase (including go-live).....	6
Onboarding Support	6
TRAINING.....	8
Our Approach.....	8
ION Academy	8
Training Sessions.....	8
Ongoing Training.....	9
EDUCATION HELP CENTRE AND SUPPORT SERVICES.....	10
Dedicated Customer Success Specialist	10
ION Academy	10
ION Help Centre	11
Why Take Customer Support?	11
SERVICE LEVEL AGREEMENT.....	12
ISO 9001 CERTIFICATION	13
CYBER ESSENTIALS.....	14
CLIENT TESTIMONIALS.....	15
Video Testimonials.....	15
Case Studies	15
Customer Quotes.....	15

SERVICE OVERVIEW

Sage Intacct for Education is a true cloud financial management service delivered by Ion Industries Ltd (ION), designed specifically for education organisations in the UK, including multi-academy trusts, colleges, and universities.

The service provides a modern, scalable alternative to legacy finance systems, enabling education providers to manage financial operations, reporting, compliance, and governance through a single, secure cloud platform. Sage Intacct for Education supports organisations as they grow in size and complexity, offering strong multi-entity and fund accounting capabilities, real-time financial visibility, and robust audit and compliance controls.

ION is a Sage Platinum Business Partner with deep experience in the education sector. Sage Intacct for Education has been shaped through extensive delivery across trusts and colleges of varying sizes, ensuring that the solution aligns with sector-specific operational requirements, statutory reporting obligations, and the expectations of auditors, boards, and regulators.

The service covers the full financial lifecycle, including general ledger, accounts payable and receivable, cash management, purchasing and expenditure control, fixed assets, budgeting and forecasting, and management reporting. Education-specific statutory and management reports are generated directly from live financial data, reducing reliance on spreadsheets and manual processes while improving accuracy and consistency.

Sage Intacct for Education is delivered as a secure, multi-tenant cloud service. Customers benefit from automatic upgrades, high availability, and access to the latest functionality without the need to manage on-premise infrastructure. Data is securely isolated per customer and hosted in accordance with Sage's cloud security and resilience standards.

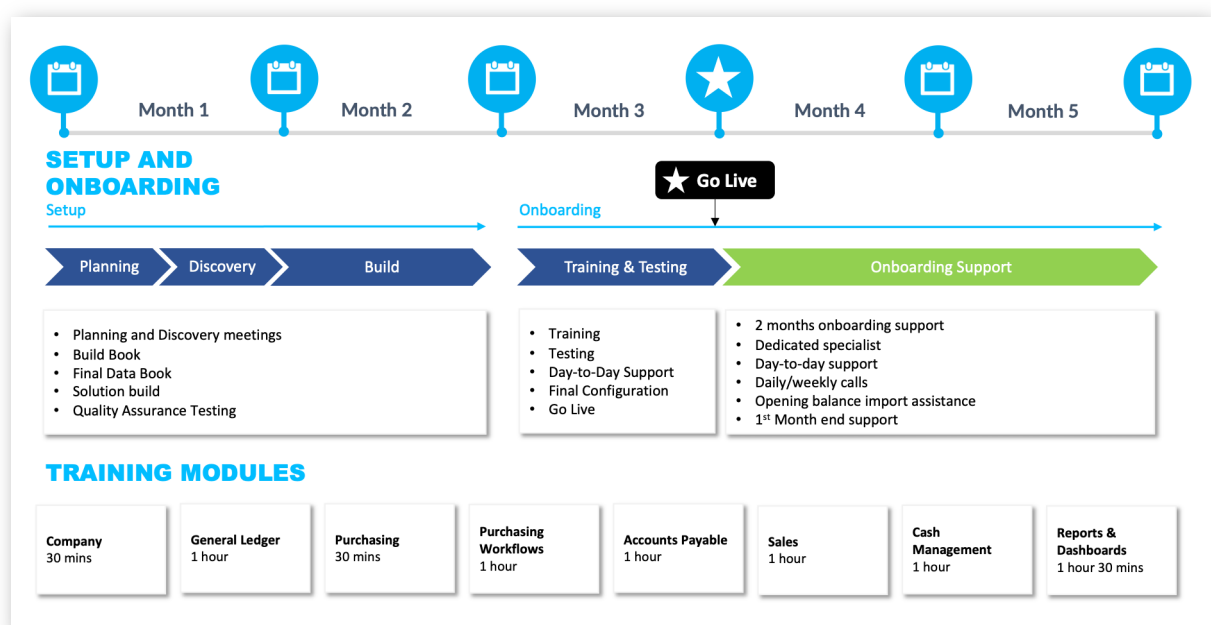
ION provides a complete end-to-end service, including implementation, training, onboarding, and ongoing support. Delivery is structured, quality-assured, and aligned to recognised best practices, with ISO9001 accreditation underpinning ION's approach to project management and service delivery.

The service is designed to improve financial control, transparency, and efficiency across education organisations, enabling finance teams and leadership to make better-informed decisions, maintain regulatory compliance, and focus on delivering educational outcomes rather than managing complex finance systems.

IMPLEMENTATION PROCESS

Delivery Process

The diagram below provides a high-level overview of the implementation process for Sage Intacct for Education.



Planning Phase

ION understands the importance of setting the project up for success from Day 1. During the Planning Phase ION will collaboratively work with you to establish the most suitable route to mutual success. We will create a bespoke project delivery plan, identifying potential risks and ensuring expectations are aligned.

We will work with you to define a clear process, incorporating mutually agreed roles and responsibilities, timelines, and quality gates. ION will also agree on the best way to work with each other and ensure all levels of stakeholder management and engagement are planned and receive the reporting and analysis that they require as we progress through each phase.

The key outcomes of the Planning Phase are:

- Delivery Plan
- RAID Log / Risk Registers
- Critical Success Factors

Discovery Phase

We will work together to comprehensively define the scope and execution of the project. At the end of the Discovery phase, there will be absolute certainty of project scope – detailed in the Build Book, identified risks and contingency plans in place to mitigate those risks.

ION is ISO9001 accredited, demonstrating our commitment to quality management and continuous improvement in delivering high-standard products and services.

The key outcomes of the Discovery Phase are:

- Completed Build Book

Implementation Phase

This phase represents the setup, configuration, and quality assurance of the desired solution. This will be the baseline Sage Intacct solution that you will subsequently train and test in.

The solution will be set up and configured based on information gathered in the Build Book that was completed in the Discovery phase. The Quality Assurance phase runs in parallel with the build and is performed by the ION QA team, involving full end-to-end testing with test plans, test scripts and an internal “End of Test” report produced to ensure a quality and assured build. ION Industries holds ISO9001 accreditation, ensuring our commitment to quality.

The key outcomes of the Implementation phase are:

- A configured Sage Intacct environment built to your needs ready to train in

Training and Testing Phase

The Training and Testing phase of the project occurs once the system has been built and verified by our QA team. You will be given access to the system to perform User Acceptance Testing (UAT).

To enable you in performing Testing, ION will provide you with the appropriate training, consisting of bespoke virtual training sessions, led by our team of Specialists, with agreed and tailored agendas over a period of typically 4-5 weeks. All sessions can be recorded for future reference.

The Test phase is end-user driven; through the provision of the Training workbook and Zendesk training we strive to ensure that end users can familiarise themselves with the system and can navigate and operate with confidence.

The key outcomes are:

- Testing sign-off

- Go-live checklist fulfilled

Final Configuration Phase (including go-live)

Upon the completion of Training and Testing and following the resolution of any changes or fixes identified within that phase, the project will move to Deployment. The key objective of this phase is to make the quality assured, tested solution, ready for Go Live. This phase will be led by ION.

Opening Balance Migration Support

ION will assist and train the users on migrating their data and opening balances. This can be done by the client at any point after going Live. The Opening Balance Migration Support exists to ensure end users and education providers are supported in migrating across accurate data into Sage Intacct.

Whilst the accuracy and integrity of the data ultimately sits with the users, ION is on hand to support through provision of the data migration templates, training and assistance on best practice throughout the process.

Data Migration

ION recommends migrating opening balances and up to two years of historic transactional data from your current system. This approach strikes the right balance between ensuring access to meaningful historical information for reporting and maintaining an efficient, low-risk migration.

Clients are responsible for data cleansing and extraction, with ION providing structured templates, guidance, and review points. This ensures accuracy without diverting focus from critical configuration and testing activities.

Migrating two years of transactions allows clients to continue generating comparative internal reports and maintain continuity for recent periods, supporting governance and audit requirements. Older historical data can be securely archived and retained within the legacy system for reference as required.

To ensure financial integrity, ION recommends a full reconciliation between the legacy closing trial balance and Sage Intacct's opening balances, ensuring complete continuity and confidence in financial reporting.

Onboarding Support

The two-month support period after go-live is designed to ensure a smooth transition and provide our clients with the necessary assistance as they adapt to the new system. Here is an overview of what the support period entails:

Regular Check-ins: We will conduct regular check-ins with your team to discuss any challenges, gather feedback, and ensure that the system is functioning as expected. This helps us identify any areas that may require additional training or adjustments.

Training and Guidance: Our support team will provide ongoing training and guidance to help your staff become more proficient with the new system. This may include online resources, webinars, and on-site training sessions, if required.

TRAINING

Our Approach

Our blended training approach combines face-to-face interactions with online activities. You will participate in a mix of classroom training, self-paced training, and bespoke consultant-led sessions delivered by a member of ION's Sage Intacct certified team.

Our approach to training focuses on equipping end-users with the skills and knowledge they need to effectively use the system, while also promoting user adoption and minimising resistance to change.

ION has dedicated Sage Intacct for Education trainers who've developed a detailed, structured approach to training. This includes an in-house created workbook, which covers the areas of training delivered with "how to" video links.

ION Academy

The ION Education Academy is our easy-to-use training library, with detailed articles and videos, to support the training and workbook further. Each subject has quizzes, which can be used to gauge the understanding of each area. ION has also created over 140 support articles which have step by step guides and videos, to support different approaches to learning.

Training Sessions

Our remote training sessions, with pre-defined agendas, are booked in and conducted via Microsoft Teams.

The dates and times of these sessions are chosen to ensure maximum client participation and are conducted in an interactive and engaging manner.

All training sessions will be recorded and distributed to the client afterward to ensure you can use them as needed. In the Training and Onboarding Support phase, ION will provide bespoke training sessions led by our team of Specialists, with tailored agendas typically over 4-5 weeks. This phase ensures that end-users can familiarise themselves with the system and navigate it confidently.

ION also offers additional training sessions at any point in the project lifecycle, with flexible agendas to ensure the client's training requirements are met and that the client is confident in using the new system to its full capacity. ION conducts comprehensive training on the system with flexibility in booking additional training sessions or on-site days.

On-site sessions can also be booked in for further support at an additional cost. Hands-on practice is encouraged to ensure that the clients are comfortable using the system.

By offering comprehensive user guides and flexible training options, we aim to facilitate user adoption, promote efficient use of the system, and ensure ongoing support for new establishments and staff throughout the contract duration.

Ongoing Training

Ongoing training is available from your dedicated Customer Success Specialist via your Support Contract.

EDUCATION HELP CENTRE AND SUPPORT SERVICES

ION's Education Help Centre is designed to provide education customers with the tools, resources and support needed to maximise Sage Intacct for Education.

Specialist Advice	• Dedicated ION specialist for your education organisation • Ongoing advice from our consultants • MAT, ESFA and Education specific guidance
Support Services	• Priority servicing • Embedded support form and chat within Sage Intacct • Full customer support portal, with knowledge base, best practice articles and ticket tracking • Raise support tickets with phone, chat and email support • UK-Based Support team • Sector-leading SLAs for super-fast responses
Continuous Improvement	• Advanced configurations • Additional automations and workflows • Building reports and dashboards • Add/updates document templates
Training	• Training for current and future employees
Technical Assistance	• Importing data • Year-end and month end reporting • Transactional queries

Dedicated Customer Success Specialist

Our customers with support contracts receive their own dedicated Customer Success Specialist. This ION team member will be your permanent contact within the business and will work with you directly to provide support, training and guidance on how to get maximum success out of Sage Intacct throughout the contract lifetime.

ION Academy

The ION Academy provides an online learning platform that you can access any time, whether to look at new features or to improve your current knowledge on a subject. The ION Academy comprises a large number of articles and videos, along with fun quizzes to help you work your way through all of the systems capabilities.

ION Help Centre

To help provide the industry's best support services, we invested in the industry's best support software. This gives our customers an easy-to-use portal, which allows us all to work together.

- Help and support articles to help with your product and industry adoption.
- Submit new tickets through our forms or through our live chat.
- Quickly access all open and resolved tickets.
- Customer satisfaction surveys after every request.

Why Take Customer Support?

Ensure Your Team's Success

Onboarding and adoption are key to the success of your new system, but that can be a continuous journey, especially when you are bringing in new entities or new staff. We help you with new processes, new employees, and new organisational challenges.

- Get support and help on day-to-day queries, for yourself or more junior team members.
- Receive best practice guidance and expert knowledge from our team of specialist consultants.
- Book product training, to help new staff use your systems.
- Day-to-day aftercare and support, whatever the problem.

Continuous Performance Improvement

Getting the right software implemented is critical, but the right solution will also allow you to improve efficiencies across all areas of accounting and drive the improvement of organisational outcomes.

- Build out advanced configurations to improve your accounting capabilities.
- Get deeper into data with assistance for report writing and dashboard creation.
- Adapt the system as changes in your organisation (and government) require it.

Protect Yourself with Risk Mitigation

Your finance system needs to be fully operational, and you need to trust that we will be there to help you.

- Support with unexpected behaviour.
- Help investigate problem data and inconsistent information.
- Assist with unscheduled downtime.
- Get industry leading service level agreements to ensure BAU.

SERVICE LEVEL AGREEMENT

Priority	Response Time	Fix Time	% Within Target
P1 – Urgent	2 Hours	13 Hours	80%
P2 – High	2 Hours	20 Hours, 30 Minutes	80%
P3 – Medium	Fix Time subject to Backlog Prioritisation	When Resource is available	80%
P4 – Low	Fix Time subject to Backlog Prioritisation	When Resource is available	80%

Priority	Definition
P1 – Urgent	An incident which has caused the service to fail completely. This category also includes incidents which have the potential to cause damage to client revenue or incur legal implications.
P2 – High	A loss of one or more components or content with limited business impact, meaning the client can still operate with a degraded or reduced set of services.
P3 – Medium	A minor loss or service or content with little impact on the client.
P4 – Low	Service requests, information, question, guidance, training and change requests.

ISO 9001 CERTIFICATION

ION is **ISO 9001 certified**, demonstrating our commitment to delivering consistent, high-quality services through a structured and continually improving quality management system. ISO 9001 underpins how we design, deliver, support, and enhance our services, providing assurance that quality and governance are embedded across the organisation.

ION's ISO 9001 framework applies to all stages of the customer lifecycle, including service design, implementation delivery, training, customer support, and ongoing service management. It ensures that services are delivered using defined, repeatable processes that reduce risk, improve predictability, and support consistent outcomes for customers.

A core principle of ION's quality management system is a strong focus on customer requirements and outcomes. Customer needs are captured and documented at the outset of each engagement and translated into clear delivery plans, success criteria, and acceptance measures. This approach ensures alignment between customer expectations and service delivery, while providing transparency and accountability throughout the engagement.

ISO 9001 also governs how ION manages risk, issues, and change. Formal risk registers, issue logs, and change control processes are used to identify, assess, and mitigate risks that could impact service quality or delivery timelines. These controls are embedded within ION's project and service management practices and are reviewed regularly to ensure they remain effective and proportionate.

Continuous improvement is central to how ION operates. Service performance is monitored through defined metrics, customer feedback, service reviews, and internal audits. Lessons learned from implementations, support activities, and service reviews are captured and used to improve processes, documentation, training materials, and delivery approaches. This ensures that quality improves over time and that best practice is applied consistently across all customer engagements.

ISO 9001 also provides assurance around governance, roles, and responsibilities. Ownership for quality management, service delivery, and continuous improvement is clearly defined, ensuring accountability at every stage. Staff involved in delivery and support are trained in relevant processes and supported by standardised templates, guidance, and controls to ensure consistent service delivery.

Regular internal audits and management reviews are conducted to confirm ongoing compliance with ISO 9001 requirements and to assess the effectiveness of ION's quality management system. These reviews ensure that controls remain aligned with customer needs, regulatory requirements, and organisational objectives.

For customers, ISO 9001 certification provides confidence that ION operates a mature, well-governed service model where quality is embedded in repeatable processes, supporting reduced risk, predictable delivery, and continual service improvement.

CYBER ESSENTIALS

ION is certified to the UK Government's Cyber Essentials standard, demonstrating our commitment to protecting customer data and systems against common cyber threats. Cyber Essentials provides independent assurance that appropriate technical controls are in place to defend against the most prevalent forms of cyber attack.

Cyber Essentials underpins ION's approach to information security and applies across our internal systems, service delivery environments, and customer-facing operations. The certification confirms that ION has implemented controls in the five key areas defined by the scheme: secure configuration, boundary firewalls and internet gateways, access control, malware protection, and patch management.

These controls help ensure that systems are securely configured, access is restricted to authorised users, devices are protected against malware, and security updates are applied promptly to reduce exposure to known vulnerabilities. Together, these measures significantly reduce the risk of data compromise, service disruption, or unauthorised access.

Cyber Essentials is supported by internal security policies, staff awareness, and defined operational procedures to ensure that security controls are applied consistently and maintained over time. Compliance is reviewed regularly to ensure that controls remain effective as systems, threats, and operational requirements evolve.

For customers, Cyber Essentials certification provides confidence that ION operates a baseline level of cyber security aligned to UK Government standards, supporting the secure delivery of cloud services and the protection of sensitive organisational and financial data.

CLIENT TESTIMONIALS

Video Testimonials

The following page provides video testimonials by Sage Intacct for Education users.

<https://www.ionhq.co.uk/video-testimonials>

Case Studies

The following organisations have provided case studies for Sage Intacct for Education.

Organisation	Schools	Link
Cidari Multi Academy Trust	15	Case Study
Delta Academies Trust	60	Case Study
Penk valley trust	7	Case Study
Queen Alexandra College	2	Case Study
Sapientia Trust	19	Case Study
Sherborne Area Schools Trust	19	Case Study
South Cumbria Multi Academy Trust	6	Case Study
St Christophers Multi Academy Trust	20	Case Study
St Cuthbert's Roman Catholic Academy Trust	15	Case Study
White Rose Academies Trust	4	Case Study

Customer Quotes

“Sage Intacct for Education, implemented by ION, has revolutionised our financial management processes. We received a strong and consistent delivery from ION and look forward to our ongoing partnership.”

Steve Etherington, Finance Manager, White Rose Academies Trust

“We are delighted with the implementation of Sage Intacct for Education. ION’s team delivered a strong project with great expertise, and we are already seeing greater efficiencies with our modernised system.”

Sophie Teasdale, Chief Financial Officer, St Cuthbert's Roman Catholic Academy Trust

“The Financial Reports produced from this solution are the best we have seen, and we produce our board report at the click of a button.”

Steven Dewing, Chief Finance Officer, Sapientia Education Trust

“We are extremely pleased with the successful implementation of Sage Intacct for Education by ION. We highly recommend it to other educational institutions.”

Karen Bromage, Chief Finance and Operations Officer, Delta Academies Trust

“The true cloud system has been transformative in boosting efficiency across multiple schools and allowing us to compile reports in minutes.”

Kevin Goodwin, Finance Manager, St Christopher's Multi Academy Trust

“The support from ION has been exceptional, ensuring a smooth transition and ongoing success. Our financial processes are now streamlined, efficient, and user-friendly.”

Ian Harris, Chief Financial Officer, South Cumbria MAT

“The implementation of Sage Intacct for Education has totally transformed our financial operations.”

Pat Mosley, Chief Financial Officer, Derby Diocesan Academy Trust

“ION's expertise and guidance throughout the implementation process made the transition seamless - we felt fully supported and in safe hands every step of the way.”

Peter Pažitka, Director of Finance and Operations, St John the Baptist CMAT

“Implementing Sage Intacct for Education has been a game-changer for our Trust. The streamlined consolidation and automated processes have saved us countless hours.”

Reyhana Sedoo, Financial Controller, Mulberry Schools Trust