



GCLOUD 15

Sage Intacct

– FINANCE & DATA
ECOSYSTEM FOR EDUCATION

Submitted by: **Schools' Choice**



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Executive Summary

Schools' Choice proposes Sage Intacct as a modern, scalable finance platform for schools and multi-academy trusts. The solution provides real-time insight, automation, strong controls and secure cloud access, with an implementation approach designed for education compliance and multi-entity operations.

- Trusted by over 600 schools and academies nationwide, with services delivered across England.
- Designed to support growth: multi-entity, increasing transaction volumes, and evolving reporting needs.
- Automation features to reduce manual effort across AP, approvals and reconciliations.
- Education-specialist delivery team providing on-site support, hypercare, and a community of peer trusts.

A.L. Crowley | Anna Cooksley
Head of Schools' choice



**Schools'
choice**

Sage Business Partner



Schools' choice

About Schools' Choice

Schools' Choice is an education specialist provider with long-standing experience supporting schools and academies. We have worked with education organisations for 25 years and our teams bring first-hand understanding of school operations and compliance.

- Solely education partner for Sage Intacct (as stated in the presentation).
- Added value from expertise across governance support, internal audit, finance, data protection, HR, payroll and pensions.
- Hands-on delivery: on-site visits, hypercare and a shared community with like-minded trusts.



A team of over 120 professionals working in education: HR consultants, Business Partners, Finance transformation consultants, Governance professionals, Payroll advisors etc



Proposed Solution: Sage Intacct

Sage Intacct provides a secure cloud finance platform with scalability, configurable reporting, and automation to improve control and efficiency.

- Scalability: designed to grow with your organisation, supporting multi-entity operations.
- Real-time insights: customisable dashboards and instant reporting to support faster decisions.
- AI capabilities: automated invoice capture, matching against purchase orders, and assistance for bank reconciliation.
- Compliance and security: audit trails, role-based access and workflow controls to remain audit-ready.
- Flexibility and integration: connects with other applications to reduce manual data entry.



Key Benefits & Capabilities

- Accelerate close: reduce monthly close times through automation.
- Increase productivity: automate routine tasks to free finance teams for higher-value work.
- Secure cloud access with automated backups and continuous updates.
- Workflow-driven approvals and configurable controls.

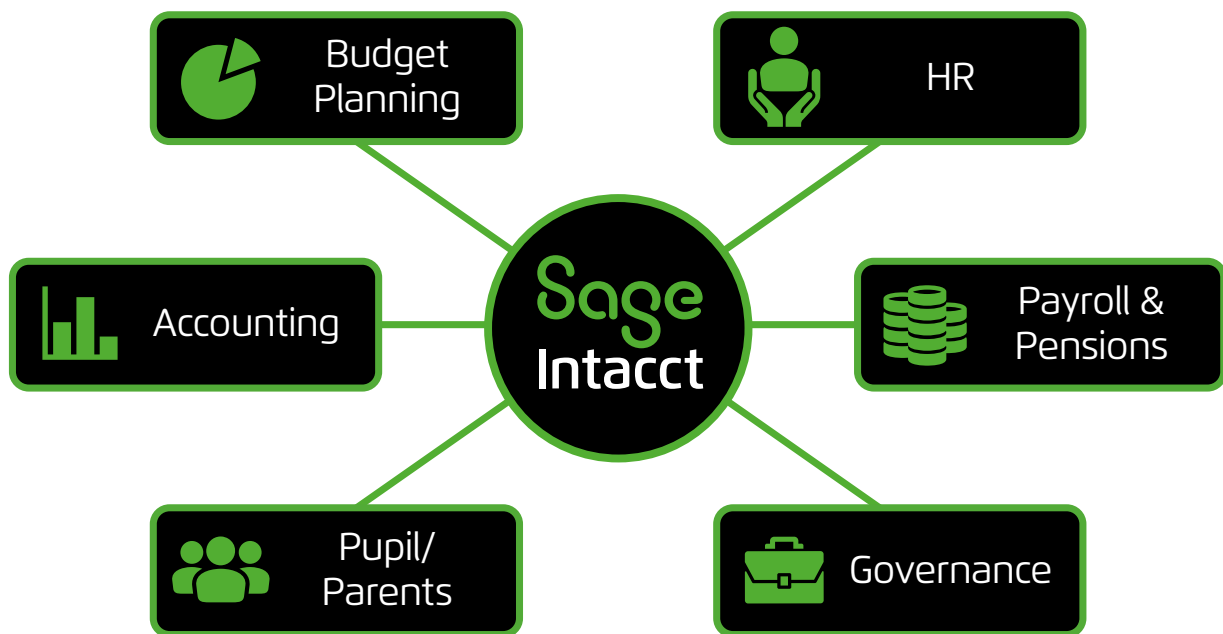




Trust Data Ecosystem & Integrations

The target operating model is a “best-in-breed” ecosystem, integrating finance with key trust systems (payroll, pensions, HR, budgeting, governance and pupil/parent platforms).

Trust Data Ecosystem (Best-in-breed integration)



Outcome: one source of truth, automated workflows and real-time reporting



Example Implementation Approach & Timeline

We propose a structured, phased implementation, combining requirements capture, configuration, testing and deployment, supported by a dedicated education-focused project team.

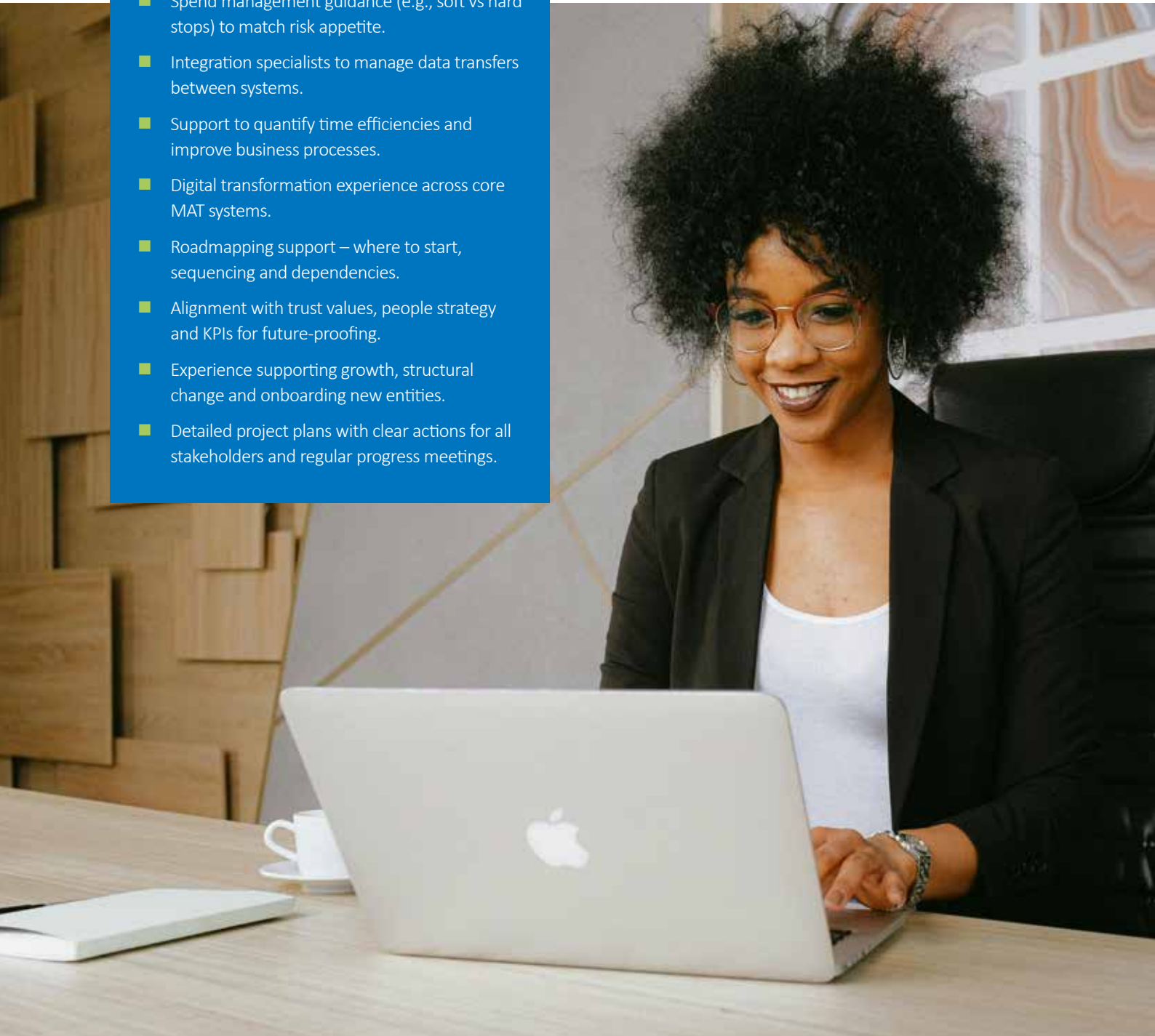
Implementation Process - Sage Intacct

- Phase 1 (July 2025): Project planning
- Phase 2 (Jul–Aug 2025): Detailed requirements capture
- Phase 3 (Aug–Sept 2025): Configuration and testing
- Phase 4 (Oct 2025): Deployment



Delivery & Project Governance

- Design and build of complex workflows aligned to trust policies and controls.
- Spend management guidance (e.g., soft vs hard stops) to match risk appetite.
- Integration specialists to manage data transfers between systems.
- Support to quantify time efficiencies and improve business processes.
- Digital transformation experience across core MAT systems.
- Roadmapping support – where to start, sequencing and dependencies.
- Alignment with trust values, people strategy and KPIs for future-proofing.
- Experience supporting growth, structural change and onboarding new entities.
- Detailed project plans with clear actions for all stakeholders and regular progress meetings.





Evidence & Case Study



Thomas Mills
High School & Sixth Form

Thomas Mills High School & Sixth Form – Summary

After 15 years on the same finance system, Thomas Mills identified the need for improved reporting, reduced manual processing and better visibility. Following implementation, reported benefits included stronger audit support, workflow approvals and quicker payroll imports.

- Enhanced reporting enabling more accurate forecasts
- Improved audit and analysis by attaching documents to transactions
- Email-based approval workflows reducing paper processes
- Monthly accruals and prepayments (previously processed only in month 7 and month 12)
- Payroll import quicker than processing in FMS
- Live bank feed supporting timely bank postings and reconciliations
- Overall efficiency gains helping teams keep up to date with day-to-day processing



"Really, really pleased that we did Sage Intacct with Schools' choice because it just made sense... We built a very thorough relationship... and reflecting back on our process of the finance software that was integral."

Thomas Mills High School & Sixth Form





Our Services (Wider Offer)

In addition to finance system delivery, Schools' Choice supports a broad range of education services, enabling joined-up solutions across the trust.

- Governance support
- Internal audit
- Financial management and consultancy
- Data protection
- HR services and HRIS support
- Payroll and pensions

Contact Details



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Implementation Deliverables

- Project initiation & kick-off meeting with all stakeholders
- Detailed requirements log and signed-off specification pack
- System configuration documents and environment setup
- Data migration templates and validation reports
- User acceptance testing scripts and defect logs
- Training plan, training materials and recorded sessions
- Go-live checklist and readiness assessment
- Hypercare support plan and post-implementation review

Thank you for reading our document.

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