

SBS Budgets gives SBM an all-in-one budgeting solution backed up by superb customer service



Trust Profile

Name
Wellington Primary School

School Category
Maintained

School type
Primary

Pupil roll
420

Age range of pupils
4 to 11

LA
Tower Hamlets, London

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Linda Prutton
School Business Manager

School Business Manager, Linda Prutton moved from a school in Enfield to a post at Wellington Primary School in 2012.

On taking up her new position, she found that the school, based in Tower Hamlets, was signed into a budgeting package which had no functionality to deal with monitoring salaries or the budget itself.

Linda subsequently attended a financial conference through her local SBM forum at which all of the delegates were given a free spreadsheet which could be used for budgeting purposes. She began using this and found it be more useful because it allowed for budget monitoring. However, it didn't do salary monitoring and it involved a lot of manual processes. There were also no reports for analysing specific areas of the budget such as Pupil Premium. “The support was limited too because the spreadsheet had been developed by a one-man band.”

In 2014, Linda attended a SBM meeting at which SBS presented their budget planning software, SBS Budgets. Initially impressed with the system, she spoke to other SBMs who were using it to get an idea of its functionality. “I was blown away by what it could do,” she commented, “and I immediately went to my headteacher and convinced him to sign up for it.”

Impact

There were several aspects of the software that improved Linda's budgeting efficiency and accuracy. The first was with regard to budgeting for different scenarios. “Duplicating budgets and creating scenarios is so easy and it's great to see the impact of this so quickly. The immediateness of seeing whether you can afford something or not is a godsend.”

Next was the monitoring functionality which was something both previous systems had lacked: “You can import your month-end from your finance software without having to do much work, and the same goes for the salary monitoring. There is no manual inputting. It takes just a couple of minutes to create the file, import it and it's done.”

The results of using the salary and budget monitors in SBS Budgets were clear by the end of Linda's first financial year using the software: “I was thrilled that at year-end we were only £3K out from where the budget monitoring in SBS Budgets had suggested we would be, and this was only because we received some unexpected income towards the end of the year.” This level of accuracy will allow her to budget more freely and creatively in the future.

Linda has also found that she completes her monitoring more quickly than before. “It used to take me over an hour, now it only takes me five or ten minutes.”



“I even put forward suggestions for improving the software and I was listened to.”

Linda Prutton
School Business Manager

Customer service

SBS strives for excellent customer support, and Linda’s experience of working with the company is proof of this. “The Service Desk is second to none. The people who staff it are wonderful and so calm and helpful.”

“I even put forward suggestions for improving the software and I was listened to.” One of Linda’s requests, related to multi-edit functionality, was included in the October 2014 release and another regarding a navigational enhancement was released in April 2015.

Next steps

Linda says she will continue to use SBS Budgets for scenario creation and planning and utilise the system’s unique analysis tags function to track expenditure against funding for Pupil Premium and the PE grant.

“We have some additional grants and expenditure coming in soon which will need budgeting for.” She also intends to sing SBS Budgets’s praises by referring SBS to other customers. “I do it all the time! Some other SBMs in the area have signed up following my recommendation and others are trying to convince their headteachers.”

Summary

SBS Budgets has solved the shortcomings of the previous budgeting and monitoring systems Linda had tried using in one, user-friendly package. It has allowed her to budget more accurately, more creatively and it has saved her time.

To find out more about SBS Budgets, contact the team on **0345 222 1551 • Option 5** or email hello@schoolbusinessservices.co.uk

schoolbusinessservices.co.uk