Access Expense gives time back to employees and enables home working at Abbeyfield

"Everything I need is there in the tool. I think it's brilliant."

Ben Stark, Project Officer for Continuous Improvement
at The Abbeyfield Society

Abbeyfield is a charity for older people providing housing across the UK and internationally. Their mission is to enhance the quality of life for older people through high-quality accommodation in a stimulating environment to maintain a socially active life.

Aims

- Replace error-prone and inefficient paper based expense process
- Reduce the time taken up by expenses for employees and finance team
- Help to future-proof the finance team

Results

- Greatly reduced duplication of effort within the finance team
- Mitigated the risk of errors in expenses
- Made expenses easier and less time consuming for employees
- Enabled working from home for the finance team and staff

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An automated system, improving consistency and visibility

Before implementing the Access Expenses module, Abbeyfield used a paper-based system that was administratively burdensome and prone to errors.

Having full sight of our previous paper-based process was a nightmare. In any business, you can have duplicate claims submitted, but without robust finance processes to deal with expenses, these are hard to spot. So, with an old paper-based system, you could have duplicate claims paid over and over again. It's open to so much error.

Since introducing the expenses module, Abbeyfield has mitigated the risk of these sorts of errors and has reduced unnecessary admin load on their finance team.

The old system could also result in a lot of duplication of effort within the finance team. Having Access has streamlined it a lot.

Enabling working from home and giving time back to staff

But the benefit of having a robust, digital expense system has not only benefitted the finance team at Abbeyfield. Employees across the company are finding that using an intuitive, digital system is a great benefit, allowing them to process their expenses easily and efficiently. Employees particularly like that the system is not limited to desktop usage.

A lot of our employees use the app. It's brilliant, I myself discovered recently that I could save my receipts on the app without needing to attach them to a claim straightaway. It's excellent, now anything I'm doing I can just snap the receipt and it's there when I need it.

The new streamlined expense process Access has offered to Abbeyfield has been invaluable in light of the recent Coronavirus pandemic. Relying on the expense module's digital capability has reduced the need for the unnecessary paper-processing and siloed data streams that their previous system would have required.

Access has made it much easier for employees to process their expenses during the pandemic. They would have absolutely had to submit hard-copy receipts with our old system, even if they were submitting their expense forms electronically. And with various sites and offices, we would have seen people submitting those expenses into different people and places, creating a siloed and long-winded process. It's really good that we'd already introduced Expenses and people were able to process them digitally.

Providing the framework and tools to make expense policy better

As part of his broader role at Abbeyfield, Ben is reviewing the organisation's expense policies. He notes that with a robust and easy to understand system in place, he feels much more confident of employee understanding and buy-in as they begin to roll out these policy changes.

We are looking at revamping our expense policy. With Access in place, it's great to know that I can put different expense types in for everything we need and then put the put limits or values and all sorts of guidance on it to help our managers, but also to allow us to scrutinise the types of claims coming through.

Like many organisations, Abbeyfield has seen significant and unexpected shifts in their business due to the Coronavirus pandemic. Using data available in Access Expenses, the Abbeyfield management has the information they need to assess these changes' impact and look at how they adapt their guidance and limits on expenses appropriately.

The pandemic has offered us the opportunity to look at some of our expense policies, for example, our travel policy, to determine what is beneficial to us as a business, and where we need to revamp our guidance and limits. Another area we will review is our IT equipment. At the start of the pandemic, of course, our priority to support our employees, and we allowed them to expense what they needed to set up at home. Still, as we continue, we want to put a much more stringent framework around that and provide limits. We also want to offer a list of preferred suppliers or the opportunity to buy some products, such as computer mice, in bulk through our IT department at a lower price than buying individually through retail sellers.

Taking the opportunity for future progression with Access Workspace

Abbeyfield has already seen significant benefit from implementing Access Expenses, but Ben is keen to explore the other opportunities and capabilities Access Workspace can offer the organisation.

Our finance team think Access is great compared to what we used to have, and they don't even know half the story of how good Access can be, as we look to take more advantage of the things the system offers us.

Ben and his team are now looking to introduce further Access Workspace apps to Abbeyfield employees as part of their new expense policy roll-out

There are some other great tools within Access Workspace that we're hoping to roll out when launching the new expense policy, things like Noticeboard and member searches. It's such a great tool we want to exploit the opportunity to use it as much as possible.

Looking forward, Ben continues to see great potential for the partnership between Access and Abbeyfield. Access has even been working with Ben, and stakeholders in other organisations, to ensure future developments are aligned with the needs of organisations like Abbeyfield.

I've had the opportunity to test out new apps in development and see mock-ups of what some apps will look like in the future, and it's really cool to be involved in that. And those new apps look like things that any user could engage with straight away, really clean and user-friendly.

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