

Customer success story

Canterbury
Archaeological Trust

Industry

Not For Profit



Professional
Services



Location

United Kingdom

Greentree product suite

Financial Management
Supply Chain & Distribution
Customer Relationship
Management
Job Cost Management
Workflow
eBusiness
Human Resources & Payroll

ERP SUPPORTS HERITAGE COMMERCE

Canterbury Archaeological Trust relies on Greentree to manage revenue from regulating development projects.

CHALLENGE An upsurge of commercial work created data management, budgeting and payroll problems for Canterbury Archaeological Trust.

SOLUTION Greentree's integrated Workflow, Job Costing and Payroll deliver live data on archaeological projects that can span several years.

RESULTS Project managers always know the status of their budgets, quotes for work are easily turned into contracts, clients are always in the loop, and project control is consistent across the board.



John Hammond, Commercial Operations Director
Canterbury Archaeological Trust

“Prerogative hit the ground running in terms of understanding our business.”

England is one giant heritage site – but perhaps none is more famous than Canterbury, headquarters of the Canterbury Archaeological Trust (CAT), one of the country's foremost “heritage policemen”.

“We’re the ones who ensure heritage sites are protected and/or documented when development work takes place,” explains John Hammond, CAT’s Commercial Operations Director. “The developers pay for our professional services, as a designated investigating authority for the Department of the Environment.

“Our Greentree system gives us complete visibility of all the projects we undertake, so our managers can track their costs, which is vital for accountability to our clients. Coupled with the work done by Prerogative, it’s really delivered value for money.”

Commercial Archaeology is born

CAT’s headquarters are adjacent to Canterbury Cathedral. The archaeological dig there is one of many ongoing projects being run by CAT’s experts around the UK and in places as far afield as North Africa, the Middle East and the Caribbean.

Legislative changes since the 1980s, aimed at protecting precious archaeological sites, have brought significant revenue streams for CAT – along with significant business pressures.

“When we started in the 1970s we were purely a charity; funding came from donations and the public purse,” says John. “Then in 1982 came the Act of Parliament that evolved the Polluter Pays Principle.”



Under the new law, developers had to pay for archaeological work required to preserve and document sensitive sites – so commercial archaeology was born. CAT is also an education charity, doing funded research work in conjunction with universities.

Today, about 85% of CAT's funding comes from commercial activities – and it was this influx of work that revealed the shortcomings of its business systems. It has a core staff of 45, but will employ upwards 100 project-based staff at any time.

‘Disastrous’ systems

“Our legacy systems were an unmitigated disaster,” John recalls. “Our finance staff had to extract raw data about hours worked and costs incurred, then manually calculate for invoicing and reports. There was a lot of double-keying and a lot of mistakes.”

There was no consistency or clarity in project data because if a project manager left or went on holiday, it was almost impossible for someone else to pick up the threads and carry on working.

“Post-excavation projects can go on for years and there were a number of high-value projects where we had no idea of what the budget was,” says John.

Greentree has changed all that; Workflow delivers real-time visibility to project managers, who now have control over their budgets.

Seamless budget control

“Our senior project managers have responsibility for a suite of projects and keeping the clients up to date,” says John. “We’ve standardised the control process, so that others can pick up the work easily in someone’s absence.”

Greentree was up against Sage, but total integration and ease of use, plus endorsements from other Greentree users, including TATA, tipped the balance.

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“What really swung it for the project managers was the ability to generate quotes for the clients in CRM that could be instantly converted to their project budget,” John says. “The client signs the contract, and then at the press of a couple of buttons it creates the job with the estimate attached.”

John says Prerogative has ensured that Greentree is geared to work the way CAT's users want. “They hit the ground running in understanding our business, and their support is always very responsive.”

“It’s great to know that CAT have received real value and benefit from Prerogative’s team,” says Ian Garvey, Prerogative’s CEO.

Confidence in the way ahead

CAT has several hundred projects on the go and with Greentree, it generates monthly snapshots of each project for budget tracking. Timesheets are also submitted and approved via the web.

The UK’s development environment is constantly expanding, and CAT is confident it can expand with it.

“House building has gone mad, which has given us the opportunity to test Greentree on a huge variety of projects,” John concludes. “That’s critical to how things are going to develop in the future; we now have the confidence to invest in areas where we need to because we can rely on the figures we’re seeing.”

CANTERBURY ARCHAEOLOGICAL TRUST LTD

The Canterbury Archaeological Trust was formed in 1975 to undertake excavations, research, publication and the presentation of the results of its work to the public. It undertakes archaeological fieldwork and desk-based research, provides planning consultation and advice, publishes both popular and academic reports, and provides education services.

www.canterburytrust.co.uk

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