

# Case Study: The Leadership Trust

**THE LEADERSHIP TRUST**  
EXCELLENCE IN LEADERSHIP DEVELOPMENT

## Hexagon successfully implements CODA Dream for The Leadership Trust

Good leadership is fundamental to the success of organisations and groups worldwide. The Leadership Trust, since its inception in 1975, has been at the forefront of leadership development, working with clients from private, public and voluntary sectors. This non-profit making organisation explores and meets clients' leadership development objectives through its' executive leadership development programmes.

Leadership development, whether for an individual on their personal leadership journey, a team wanting to work more effectively, or across an organisation experiencing change, is something at which The Leadership Trust excels with its extensive expertise and knowledge.

The Leadership Trust's dedicated training centre near Ross-on-Wye draws on its calm and tranquil surroundings together with its extensive experience and knowledge to deliver outstanding leadership development programmes for Directors and Senior Managers from across the world.

### A SYSTEM THAT COULD COPE WITH THE COMPANY'S GROWTH

During 2000 the Trust undertook a complete review of their IT systems. Their accounting system had been in place for several years. During this period they had expanded and their needs had out-grown the software's capacity. Amanda Eckley Finance Manager, researched the accountancy software market for a product that would keep up with the Trust's planned growth and also integrate with their bespoke sales administration system.

### THE ONLY SOLUTION THAT SATISFIED ALL OUR REQUIREMENTS

Dream was the only accounting software solution that satisfied all of the requirements. Amanda comments:

*"Hexagon took time to understand our business and all of our diverse but integrated activities. This attention to detail was reflected in the resulting system. The user-defined input screens developed enabled our exact business rules to be followed. The front-end screens were designed to be user-friendly, with the complex accounting entries happening 'behind the scenes'. The built-in business rules significantly reduce the risk of users entering incorrect data and give us confidence in the resulting management information. The Windows based nature of DREAM gives it a familiar look and feel to the users. This, combined with the ease with which it is possible to drill down through the data, made it clear that the software has been designed with the user very much in mind."*





## CLEAR TIME SAVING BENEFITS

*"Time spent on data entry has been significantly reduced as data needs to be keyed in only once. This removal of duplication also reduces the possibility of error. Preparing reports and performing data analysis that previously involved hours of work is now much more straightforward. Dream's unified ledger structure and drill down facilities gives us immediate access to all the information in the system at various levels of detail."*

## MANY ADVANTAGES OVER TRADITIONAL ACCOUNTING APPLICATIONS

*"We have found that Dream has many other advantages over the more traditional accounting software package. Three major benefits for us have been:*

- *Nominal account indices. These give an unlimited number of tailor-made views of the trial balance.*
- *The ability to amend postings without the need for additional journal entries. This saves a considerable amount of time, especially at month-end.*
- *The ease with which it may be used with other industry standard tools. When we need to pull data into other applications such as Microsoft Excel it is very straightforward."*

## SEAMLESS INTEGRATION WITH OTHER APPLICATIONS

*"We have also fully exploited Dream's interface with our Banking software. Bank statement details are imported periodically into DREAM and reconciled automatically using Dream's bank reconciliation facility. This saves us a great deal of time and eliminates the tedious manual job of matching up statement details with hard copy records."*

## A FLEXIBLE SYSTEM THAT IS USER-FRIENDLY

Amanda concludes...

*"When starting our search for a new finance system we thought that it would be impossible to find a single accounting package that would do everything we wanted. Dream and Hexagon, have proved this not to be the case. The software's flexibility and user-friendliness, assures us that we have made the right choice for our needs both now and in the future. The support we have received from Hexagon and the help desk team at CODA has been excellent."*

*"The sophistication of Dream has simplified our processes saving us time and money"*

### ABOUT HEXAGON

The Hexagon Software Group was formed in 1973 and focuses on the supply of specialist property management software designed for Owner/Investors and Managing Agents. As an accredited Coda Partner, Hexagon is responsible for the supply, implementation and support of CODA-Dream in the property sector. The combined expertise enables Hexagon to deliver and support one of the best and most versatile Property Management solutions on the market today.

### ABOUT DREAM

Dream is a "best of class" unified Ledger accounting system. It was created by CODA as a dedicated financial software solution that integrates easily with other business systems. It was designed to cover a wider range of accounting functions that would be found in the accounts module of a multipurpose ERP (Enterprise Resource Planning) System.

It was designed for accountants by accountants and consists of the core nominal, purchase, sales, and cash ledgers and additional ledgers that may be applicable to business. Administrative purchasing, fixed asset accounting and reporting are all available to manage business expectations. The unified nature of the system means that it is always in balance, allowing immediate access to the latest data. This makes period and year end procedures significantly faster.

Dream provides flexible and scaleable user-defined accounting that can suit all requirements and can also react rapidly to match and keep pace with a business as it develops.

Dream's ease of use is also reflected in the installation process. Due to the strengths of the underlying architecture, getting the system up and running is a rapid and simple process that is carried out to within guaranteed timescales.