



Financials

Learning Academy Partnership makes time count with IRIS Financials



learning
academy
partnership

Customer Story

As multi-academy trusts continue to grow and evolve, the systems that support them must be able to keep pace. For finance teams, this means having software that is not only reliable and secure, but also flexible enough to adapt to organisational change, increased scale, and rising expectations around efficiency and transparency. For Learning Academy Partnership (South West), ensuring their finance systems could support both day-to-day operations and long-term growth has been a key priority.

LAPSW is a rapidly expanding Trust in Kingsteignton, currently comprising 18 schools and set to grow to 22 in the near future. Finance is fully centralised, with a team of six supporting schools across the Trust. IRIS Financials was already embedded when Daniel Jones joined as Operational Finance Lead two and a half years ago, providing a stable and consistent platform to support both daily finance activity and future growth.

Highlights

- Successful upgrade to Version 7, delivering measurable time savings
- Improved efficiency in payment runs, period creation, and audit preparation
- Responsive and reliable support, providing confidence and continuity





A fully centralised finance function

Daniel manages the central finance team, with schools supported by administrators who raise requisitions and purchase orders. ***“We’re completely centralised,”*** Daniel explains. ***“We don’t have any school business managers – everything finance-related is done centrally. Schools raise purchase orders and requisitions, and we speak regularly.”***

This model relies heavily on having a system that works well for both central staff and school administrators. ***“IRIS Purchasing is user friendly,”*** Daniel says. ***“You can log in from anywhere because it’s web based. The admins at schools really like it – they can add requisitions, add purchase orders, receive updates and add notes. From their side it’s really easy to use and they enjoy the system.”***

When schools need support, collaboration is straightforward. ***“If the admin has a problem, they phone us, and we can log in, look for the order and help them out,”*** Daniel explains. ***“That visibility makes it much easier to support schools quickly.”***





Supporting audits with confidence

Before joining the Trust, Daniel spent over ten years as an auditor, including several years auditing schools. That experience has shaped how he approaches financial systems. *“I’d used IRIS Financials quite a bit because I audited in schools,” he says. “So, when this role came up, it lined up perfectly.”*

From an audit perspective, Daniel sees clear benefits. *“If you know how to use the system properly, it is a fantastic bit of software,”* he explains. *“You store your invoices digitally, the search functionality is great, and it’s easy to find the invoice when you need to match up transactions.”*

That structure has helped streamline audits year on year. *“Having been on the other side of the audit table, I know what auditors are looking for,”* Daniel adds. *“IRIS Financials makes audits incredibly straightforward. Our CFO is happy with our setup because she knows it’s under control and our audits will be smooth. This can be a headache for a lot of schools, but if you have a system in place that can support you, it doesn’t need to cause stress!”*



Working faster and smarter with Version 7

One of the most significant recent developments for the Trust has been the move to IRIS Financials Version 7, delivering clear improvements in speed and efficiency across the finance function. Daniel describes the upgrade experience positively, particularly the training. ***“The sessions were really helpful,”*** he says. ***“Our Assistant Finance Manager and I had a Teams session over two days, and the trainer walked us through the system.”***

What stood out was the trainer’s depth of knowledge. ***“She was brilliant – really knowledgeable on how the whole system worked,”*** Daniel explains. ***“She really knew her stuff, which gave us a lot of confidence.”***

While there was an initial adjustment period, the benefits quickly became clear. ***“At first, due to the new layout, things had moved around a little bit, so it took a little bit of time to get used to it, as you would expect with any system upgrade.”*** Daniel says. ***“But now, yes, we’re working more efficiently than before - we’re very glad we did it.”***





Some of the biggest time savings have come from automation. *“Creating the new year and the periods used to be a tedious task,”* he explains. *“Now it creates them all automatically with a couple of clicks. Same with VAT periods – it really saves a lot of time.”*

Payment runs have also become more efficient. *“Running the BACS payment run each week is quicker,”* Daniel says. *“You just click post, and it creates document numbers, allocates and posts. Before, there were more steps – now it’s much easier and a lot quicker and cleaner.”*





Support that adds real value

Support has been a particularly positive aspect of the Trust's experience with IRIS Financials. ***"I will say, the support from the team at IRIS is really good,"*** Daniel says. ***"And it's improved a lot, particularly in the response times. In the last year and a half, it's been fantastic,"*** Daniel explains. ***"If you raise a ticket, you'll usually get a response on the same day, or at least the next day, and more often than not it gets resolved straight away."*** For a central finance team supporting a large number of schools, this level of responsiveness has made a tangible difference.

He also praises the Trust's account manager. ***"If I email our account manager, he always gets back to me the same day. If something's not progressing, he'll sort it out. You don't always get that with other software providers, but he really takes accountability for us."***

This combination of responsive support and knowledgeable contacts has reinforced confidence in the system and allowed the team to focus on delivering efficient finance operations.





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A system that supports growth

Reflecting on his experience, Daniel is clear that IRIS Financials has played an important role in supporting the Trust's finance function. When used to its full potential and backed by effective training and support, the system provides the functionality and reliability needed to manage finance at scale within the education sector. *“I've seen and used a number of other systems, and IRIS Financials is up there as one the best,”* he says.

For Daniel, the key is training and understanding the system's full capability. *“When you know how to use IRIS Financials functionality properly, it's incredible. It does everything you need it to do.”*

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