Endeavour Foundation Sage 200 Evolution Implementation

Endeavour Foundation unified systems across 37 sites, reduced risk, improved visibility, and delivered a seamless transition—on time and under budget.

About Endeavour Foundation

Endeavour Foundation is an independent, for-purpose organisation established in 1951 with a vision to support people to live their best life – starting with equal access to education and life-skills learning. Endeavour Foundation focuses on ability, dreams, goals, and potential, and collaborates with the people they support to imagine their possibilities and work together to make them happen. Endeavour Foundation operates at the heart of local communities and supports over 21,000 people across Queensland, New South Wales, South Australia, and Victoria.

The Challenge

Over the years, as Endeavour Foundation expanded its operations to 37 sites across a widespread geographic area, it inherited three separate Enterprise Resource Planning (ERP) systems. One of the 37 sites is Therapeutic Goods Act (TGA) approved and has unique requirements for its ERP system to comply with TGA regulations and guidelines.

Having three ERP systems was resulting in lost productivity, an unacceptably high total cost of ownership and overly complex ICT support arrangements.

Furthermore, all three systems had passed their end of life, were no longer supported by their vendors, and were running on outdated operating systems

"The operational and business continuity risks associated with three aging and unsupported ERP systems, and the ongoing manual work required to reconcile accounts across the systems, were not tenable.

We have 110 system users across 37 sites, and each site has a unique business model. For this project to be successful, we had to bring our people on the journey, and we had to ensure minimal operational disruptions" **David Blower, EGM Finance and Risk – Endeavour Foundation**

Key Requirements

To ensure a successful implementation of Sage Evolution v10 and support broader business objectives, the key project requirements include:

- Move to the latest version of Sage Evolution (version 10)

- Transition all 37 operating entities to one system and train 110 system users

- Stage the transition to ensure minimal disruption to the business

- Integrate Sage Evolution v10 with Microsoft Dynamics AX

- Streamline and simplify Endeavour Foundation's invoicing processes

- Provide expert ICT support to Endeavour Foundation's ICT team to enable the successful transition on their infrastructure

- Maintain compliance with the Therapeutic Goods Administration for the one site

- Provide management with a business wide view of customer and product performance

- Provide full, ongoing support for the Sage Evolution system

The Solution

Endeavour Foundation decided to consolidate all three ERP systems to Sage Evolution v10. They went to market to find a partner with extensive large-scale ERP system implementation experience to develop the project strategy and work closely with them to successfully implement each stage of the project.

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To kick-off the project, PBT and the Endeavour Foundation project team met over several days to fully assess the current state and to develop the overall project strategy and governance. This approach mitigated the risk of disruption to the business, minimised the need for process change, and enabled Endeavour Foundation to determine the optimal implementation strategy and method with the guidance of PBT.

"PBT has extensive experience implementing ERP systems into Non-Profit organisations and into TGA approved sites.

Their ability to rapidly assess and understand our unique business operations, anticipate the key challenges, and discuss pragmatic solutions in our language was evident in every interaction we had with them."

David Blower. EGM Finance and Risk – Endeavour Foudation

The Implementation Process

Strong Client Engagement

Endeavour Foundation established strong executive oversight and governance for the project, with David Blower, EGM Finance and Risk, appointed as the Project Sponsor. The project team reported to a formal Project Steering Committee, which met regularly and quickly made decisions to keep the project on track.

Detailed Project Methodology

Working together, Endeavour Foundation and PBT established joint project teams with dedicated project managers and highly capable and experienced team members. PBT provided the implementation strategy and the detailed project methodology.

Team Collaboration

Endeavour Foundation established regular, highly collaborative stand-up meetings and developed and maintained a shared task board. The project teams met regularly, and all tasks were closely monitored with clear accountabilities maintained throughout the project.

All stages of the project were successfully delivered remotely via Teams, with effective participation and engagement from all stakeholders situated across a large geographic footprint. This enabled the project to progress successfully and without interruption due to COVID restrictions.

"The PBT team provided exceptional support to our team and communicated with us in a way that quickly built our confidence and capability.

This, combined with their strong ICT and technical integration support and effective project management, enabled us to finish the project within the required timeframes and under budget."

Leigh Gorton – Endeavour Project Manager