



Simpson Associates

Nottingham Trent University

Case Study: Student Planning, Resource Planning and Financial Planning

Client Overview

Nottingham Trent University's roots go back to 1843 with the establishment of the Nottingham Government School of Design which still exists within the university today. It is the 16th largest university in the UK with 26,890 students split over three different campuses.

Client Response

"We now have an integrated planning tool. We put in course data and student data and use that to model our student numbers and our fee income, we input employee data and use that to model our resources that are required and then both of those feed into our finance model which summarises the income and the cost for the university during the period."



Key Benefits

- The integration of their planning models has enabled NTU to have a holistic view of the whole planning process.
- Reports come directly from the planning model improving the speed of access to information and the confidence in the accuracy of that information.
- NTU can now spend more time doing analysis and adding value rather than concentrating on data input and consolidation.
- NTU can now model different scenarios and see the impact on proposed changes to their budgets.

Summary

Nottingham Trent University and Simpson Associates embark on an award winning project, implementing IBM Planning Analytics for Student, Resource and Financial Planning, thus unifying the planning process across the university.

Ambitious Plan

When Nottingham Trent University engaged with Simpson Associates they had an ambitious plan to develop a planning application to connect course data, student data and employee data to feed into a finance model to summarise student income and costs across the university.

In order to meet an impending deadline the project was split into two phases;

- The objective of the first phase was to replace the University's existing Student Planning model. This was built with IBM Planning Analytics software to provide a fit for purpose application that sped up the planning process and gave more time for analysis.
- The objective of the second phase was to add Resource Planning and Financial Planning to create an end-to-end planning process.

Rebecca Radics, the Project Manager describes the rationale for the project: "We wanted to integrate our overall planning model to create a holistic view of the whole process: data flowing automatically between the student planning model and the staff planning model meant that we could save staff resource time maintaining them and ensure we were able to get accurate information out of the system in real time."

Skills Transfer

Nottingham Trent University engaged IBM Business Partner Simpson Associates to help develop their models; partly because they had worked with IBM Planning Analytics software for a number of other Universities and partly because they were able to commit to a programme of mentoring and skills transfer with University staff. This approach ensured that the required deadlines could be met and that the University maintained ownership of the models into the future.

"We wanted to make sure we developed in-house skills so we developed a mixed approach to the project, where some of the models were produced by Simpson Associates and some of them we worked together on. During this process Simpsons mentored our team, helping them develop the necessary skills needed to make further developments in the future."

Rebecca Radics

Project Manager

While the deadlines were particularly ambitious both the team at NTU and Simpson Associates worked tirelessly to deliver this project which ended up being delivered on time and on budget. Rebecca commented: "Simpsons worked really well with us. The consultants took the time to answer us no matter what time of the day. Overall the engagement with us and Simpson Associates felt like we just had one team, everyone was working together."



"Moving forward we're looking at how we can use Planning Analytics for other regulatory reporting that we do, for instance TRAC and HESA reporting".

Sue Reader
Corporate Finance and Planning Manager



Integration across the planning process

By integrating their planning models Nottingham Trent University have given themselves the ability to see the effects of modelling across their various planning systems without the need to move data around, thus giving them more time to analyse information.

Sue Reader, Corporate Finance and Planning Manager, describes what they have achieved: "We now have an integrated planning application. We put in course data and student data and use that to model our student numbers and our fee income. We input employee data and use that to model our resources that are required. Then both of those feed into our finance model which summarises the income and the cost for the university during the period."

Additionally key stakeholders in NTU have a greater degree of confidence in their reports, with numbers coming directly from the plan, as Sue explains: "It benefits people asking for information because they get it more quickly. They benefit from it coming directly from the plan compared to how it used to be done; essentially creating a manual process each time to source the data, join it and then develop a report. As the information is now coming directly from the planning model it's quicker, easier and totally reliable and of course, it's consistent with our plans."

Moving forward with IBM Planning Analytics.

Having completed the project with IBM Planning Analytics powered by TM1 software, the University is now looking at utilising their investment for other purposes. Sue sees a number of opportunities: "Moving forward we're looking at how we can use Planning Analytics for other regulatory reporting that we do, for instance TRAC and HESA reporting. This would reduce our reliance on spreadsheets and allow automation of the apportionment process. Currently we use spreadsheets to do this so any changes that are required have to be fed through spreadsheets, which is a largely manual process."

An award winning project

Following the successful implementation of IBM Planning Analytics powered by TM1, Simpson Associates were delighted to hear that NTU had awarded them the "Best Use of Technology" award at their annual supplier awards.



"The University has an annual supplier award where we recognise the value suppliers add to the University. We nominated Simpsons and IBM as a partnership for the solution they provided for Planning Analytics and the support given. The award was for best use of technology and really does shows the innovative use of TM1 to provide us with the holistic solution for our five year plan. "

Rebecca Radics
Project Manager

Support from Simpson Associates

Simpson Associates are specialists in defining, building and implementing information management solutions, which provide better business understanding and improved business management performance.

Our considerable skills and experience enable long-standing relationships with our clients and we have principal partnerships with Microsoft, IBM Cognos and BOARD.

Contact us

Should you have any questions or require any further information, the team at Simpson Associates will be happy to help you with your request.

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