



CUSTOMER
Castle Howard
Estate Ltd



INDUSTRY
Tourism



LOCATION
United Kingdom



**GREENTREE
PRODUCT SUITE**

- Financial Management
- Distribution
- CRM
- HRM
- Workflow

Castle Howard making history with Greentree®

Greentree brings a 21st century solution to 18th century icon, Castle Howard Estate. Known worldwide as Yorkshire's premier historic house, Castle Howard's mission is to use the profit generated by the estate to fund restoration and conservation of its historical buildings and landscape. The estate runs a diverse range of business interests including retail, farming, forestry, property and tourism.



Having long outgrown their Sage accounting package, Castle Howard began the search for a flexible business solution that could manage a large number of transactions, store departmental budgets and produce monthly management accounts in a secure environment. The team at Castle Howard allowed themselves months to consider their options to ensure they decided on the right solution. After reviewing an extensive list of systems they short listed their selection to just four, including Greentree.

Diverse modules, dedicated support

"We first saw Greentree at an exhibition, then had a demo back at the office. We made the decision after that. It wasn't just the endless modules, but also the drill down, Excel reports and perhaps, most importantly, the proactive attitude of the Greentree Business Partner. We gave them issues that we wanted to address and they knew the system so well that they

were able to find ways to help us," says Karen Taylor, Management Accountant at Castle Howard.

Castle Howard decided to breakdown the implementation of Greentree into stages with HRM first, followed by Financials. "We set it up to operate along the same lines as the old system and focused on getting reporting right. We're now introducing Purchase Order and Commitments, CRM for our Marketing Department and Debt Recovery will be ready for use in a few months."

The benefits for the company are already evident. "Month end now takes three days instead of five days. We have also set up

spreadsheets in Excel that feed information into Greentree at the push of the button which saves keying-in time."

Managers at Castle Howard are equally 'ecstatic' with the system's ability to interrogate management accounts and income and expenditure data. Greentree's security settings have also enhanced operations with staff being able to access only the data that relates to them, eliminating the need for separate and disparate systems.

Streamlined processes

Greentree has allowed Castle Howard to

CHALLENGE >

Castle Howard needed a business system to cope with its diverse activities in retail, farming, forestry, property and tourism

SOLUTION >

Greentree's integrated modules provide Castle Howard with flexible tools to effectively manage their business

RESULTS >

Streamlined processes and empowering access to critical data and advanced reporting with future scalability



“We heard about Greentree and how flexible it was, so we brought it onto our list for consideration and were very glad that we did.”

- Karen Taylor, Management Accountant, Castle Howard Estate Ltd

streamline processes and access information that was previously problematical to retrieve. Greentree’s ability to store statistical information on visitor numbers and transactions, copies of invoices and purchase orders has benefited the company’s organisational operations. “With the storage of multiple budgets we can now produce the management accounts that were so difficult to produce before, and with the storage of statistical information we can also generate daily trading reports, monthly marketing reports and information on ticket trends. We also have the opportunity to consolidate several small databases into one and eradicate some duplication of information. We are happy with the stability of Greentree in terms of data integrity and management.”

Karen further reports that the accounts team are familiarising themselves with the different menu layouts with positive feedback, managers are thrilled that they now have a wealth of information at their fingertips and the Estate Manager now has a system that

he can click his way around. “Using the system has been the best training. As the users have got to grips with the system they have found the benefits it provides.”

Stress-free implementation

The Greentree Business Partner worked closely with Castle Howard to ensure minimum disruption to daily operations during the implementation. “The implementation has been very successful and not nearly as stressful as I have seen other systems to be. They are very helpful and always look at a problem and come up with a solution for you, whether it is just an item on a menu you’ve missed or something that requires consultant time and another module,” says Karen. “The project has been delivered on time and on budget.”

Castle Howard is confident that Greentree will be with them for the long term with the capacity to accommodate the company’s future growth and requirements. “We are



aware of future developments that can assist us with our business goals. I foresee us being very happy with Greentree for quite some time.”

ABOUT CASTLE HOWARD ESTATE LIMITED

Castle Howard is known worldwide as Yorkshire’s premier historic house. The estate runs a diverse range of business interests including retail, farming, forestry, property and tourism employing around 100 permanent and 150 casual staff. The estate has an annual turnover of £6 million. Castle Howard’s mission is to use the profit generated by the estate to fund restoration and conservation of its historical buildings and landscape.

For more information visit: www.castlehoward.co.uk

ABOUT GREENTREE

Greentree International specialises in developing highly effective business management software solutions. The Greentree product has been developed by the authors of CBA, arguably the most successful business software package for small to medium sized businesses in Australia and New Zealand.

In choosing Greentree you are selecting a business system that will truly empower your organisation today and grow with you into the future. The Greentree Partner Network provides a highly skilled local support team that will ensure you achieve tangible business benefits. Greentree has also recently been recognised as a global ‘Rising Star’ by MIS magazine Australia.

For more information visit: www.greentree.com

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BUSINESS-BUILDING SOLUTIONS
“very, very, responsive!”