

Customer success story
Castle Howard Estate Ltd

Industry
Tourism 

Location
United Kingdom

Greentree product suite
Financials
Distribution
CRM
Human Resources
Workflow

Greentree business partner
Prerogative

CASTLE HOWARD MAKING HISTORY WITH GREENTREE

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

Greentree brings a 21st century solution to 18th century icon, Castle Howard Estate. Known worldwide as a 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 and implementation partner. 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 fully integrated modules that impressed, but also the drill down information capabilities. The proactive attitude and professionalism of the local Greentree Business Partner Prerogative significantly influenced the business decision. We gave Prerogative issues that we wanted to address and they knew the system so well that they were always able to find ways to help us," says Karen Taylor, Management Accountant at Castle Howard.

Castle Howard decided to break down the implementation of Greentree into stages with HRM first, followed by Financials. "Prerogative helped us set it up to operate according to what we were familiar and comfortable with 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 and implementation partner Prerogative have allowed Castle Howard to 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. Karen Taylor says, "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 positive feedback, with managers now thrilled that they have a wealth of information at their fingertips and the Estate Manager now has a system that he can easily click his way around. "As the users have quickly got to grips with the system they have found the benefits it provides."

Stress-free implementation

The Greentree Business Partner Prerogative worked closely with Castle Howard to ensure minimum disruption to daily operations during the implementation. "Prerogative ensured the implementation was successful and not nearly as stressful as I have seen other systems to be. Prerogative 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 with Greentree that can assist us with our business goals. I foresee a highly productive relationship with both Greentree and Prerogative for the future."

we³


Castle Howard
YORK

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.
www.castlehoward.co.uk

PREROGATIVE


Prerogative, which (including last year) has been consecutively awarded International Greentree Partner of the Year, is the UK's most experienced Greentree reseller. With its vastly experienced implementation team, it has an outstanding record of successfully implementing systems across a wide range of sectors in the small to medium sized business arena. Combined with first class support and a commitment to the ongoing relationship with its customers, Prerogative continues to add value to its clients.
www.prerogative.co.uk

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