

Bloor Homes and Forte Building for the Future

The Middleton
A Five Bedroom detached house with 3 En suites and double garage



Background

The Bloor group began building houses over 35 years ago, and is today one of the largest privately owned housebuilder groups in the UK. Building in excess of 1800 homes each year, the housebuilding operation is managed through 8 regional companies.

For the third year running Bloor Homes has received the highest rating possible for the 'National Customer Satisfaction Survey'. The survey, carried out by MORI, was based on a representative sample of over 9,000 owners of newly built homes selected from databases supplied by NHBC and Zurich. It assesses UK builders in criteria such as construction and finish, value for money, conditions on moving in day and after-sales service. Bloor Homes is one of only six builders in the UK to achieve the top 3 Star Award at over 95% confidence for all criteria.

The Problem

The existing system was some 15 years old and although it had served the company well it was felt that a modern system was needed. This was in order to respond to demands for up to date management information and the increase in volume, especially in the Purchase Ledger area.

Mandatory Requirements

A number of requirements were considered crucial:

- Retentions at Supplier, Order and Invoice level
- Construction industry scheme support
- Scanning of invoices & delivery notes and subsequent remote authorisation
- Drill-down to cost explosion
- Integration with the SiteStream House Building System
- Ability to operate in a Citrix environment.

Forte demonstrated that it met all of these criteria within its standard package, with the exception of the scanning solution. It was agreed that this would require a bespoke element, as Bloor Homes' requirements were very specific in this area. Cyberscience produced a prototype for this element. This enabled both users and management to visualise and evaluate the look and feel of the final solution, which was required to utilise the existing scanning hardware.

A formal specification was produced and agreed with the initial version going live only five weeks later. Weekly progress meetings and presentations of the new software kept the Purchase Ledger staff fully involved in the specified solution. Further enhanced versions have been delivered in line with comments and additional features that have been subsequently identified.



"We have no regrets in our choice of Forte", said David Seeds, leader of the implementation team. "It is delivering real benefits and will continue to do so. The close relationship we have enjoyed with members of the Forte team has been key to this result".



Implementation

The implementation was undertaken with a very challenging timescale of only 12 weeks, which enabled Bloor Homes to commence use of the new system at the start of the new tax year.

Data conversions were specified and tested in readiness while the users were being trained in the use of the system on the actual converted data. This was beneficial to the users as they were viewing data that they were familiar with and it also helped with ironing out any data conversion queries.

An opportunity to review and rethink the structure of the Chart of Accounts was also incorporated into the plan. This reflected the need to consider both the on-going Group requirements and the need for timely financial information support for the local divisional management.

Interfaces

Interfaces from the SiteStream House Building System populate the Forte budget module with estimated building costs resulting in enquiry and reporting facilities for each plot with Forte. Cumulative costs for each plot are exported from Forte to SiteStream on demand for cost/value reconciliations. This ensures that both systems have the latest information available.

An interface imports costs from the payroll system automatically each week. Supplier invoices from a major supplier are also captured via the third party interface module directly into the Purchase Ledger.

Regular project review and planning meetings were held during the implementation with senior management and users. This ensured that any slippage was identified early and remedial action put in place. Regional meetings were also held with local management, finance, surveyors and buyers.

Management Information

Forte consultants worked closely with Bloor Homes to design specialised reports for the divisional management. Reporting is now concise and on demand with a faster production time. The reports are now accessible on-line by all users, including the divisional management and surveyors, and can be delivered in a variety of formats including Excel and HTML.



Immediate Benefits

- User-friendly and comprehensive access to integrated data.
- Directly available Divisional views with full drill-down to all the data.
- Automatic bank reconciliation via electronic statement download.
- Drill-down to images from the General Ledger and Purchase Ledger.
- On-line live updates ensure information is always current and up-to-date.
- Significant time and some staff savings achieved through faster input and advanced reporting features.
- Tighter control of CIS transactions for sub-contractors resulting in improved audit trails and reconciliation.



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