

## Data Management

# Information Systems

**A** lfaFinTec led a systems customisation and process-redesign engagement that delivered stronger controls, faster reporting and measurable reductions in process cost and information friction.



*A public-sector foundation funding rural housing and social infrastructure required improved information management and operational reporting to manage grants, procurement and project performance across dispersed works.*

Most systems required aligning logic to optimised workflows, add stronger controls and embedding governance directly into their workflows, enable faster reporting through real time, clean data capture, and ensure measurable reductions in process cost and information friction.

They needed to transform data movement from a cumbersome operational hurdle into accurate, real-time data flows that support operational and financial decisions.



# Typical challenges for utilities & community infrastructure programmes

Public and social infrastructure programmes face several recurring challenges:

- Fragmented reporting between field delivery, procurement and finance, causing delays in payments and poor oversight.
- Manual reconciliations and paper-based approvals that create bottlenecks and audit risk.
- Difficulty demonstrating impact and value to funders and stakeholders because data are inconsistent or inaccessible.

**These issues slow delivery, increase transaction costs and can impair future funding prospects.**



# Approach

## 1. End-to-end process capture

Conduct workshops with project managers, procurement, field engineers and finance to map the order-to-pay and project reporting flows. This reveals the gaps between physical works, inventory movements and ledger entries.

## 2. Requirements-led system customisation

Implement targeted customisations to the client's ERP/management system so that dispatch, receipt and milestone certificates record both operational and financial events in a single workflow.

Introduce role-based checkpoints to prevent unauthorised ledger adjustments and to create a clear audit trail.

## 3. Data warehouse and simple analytics

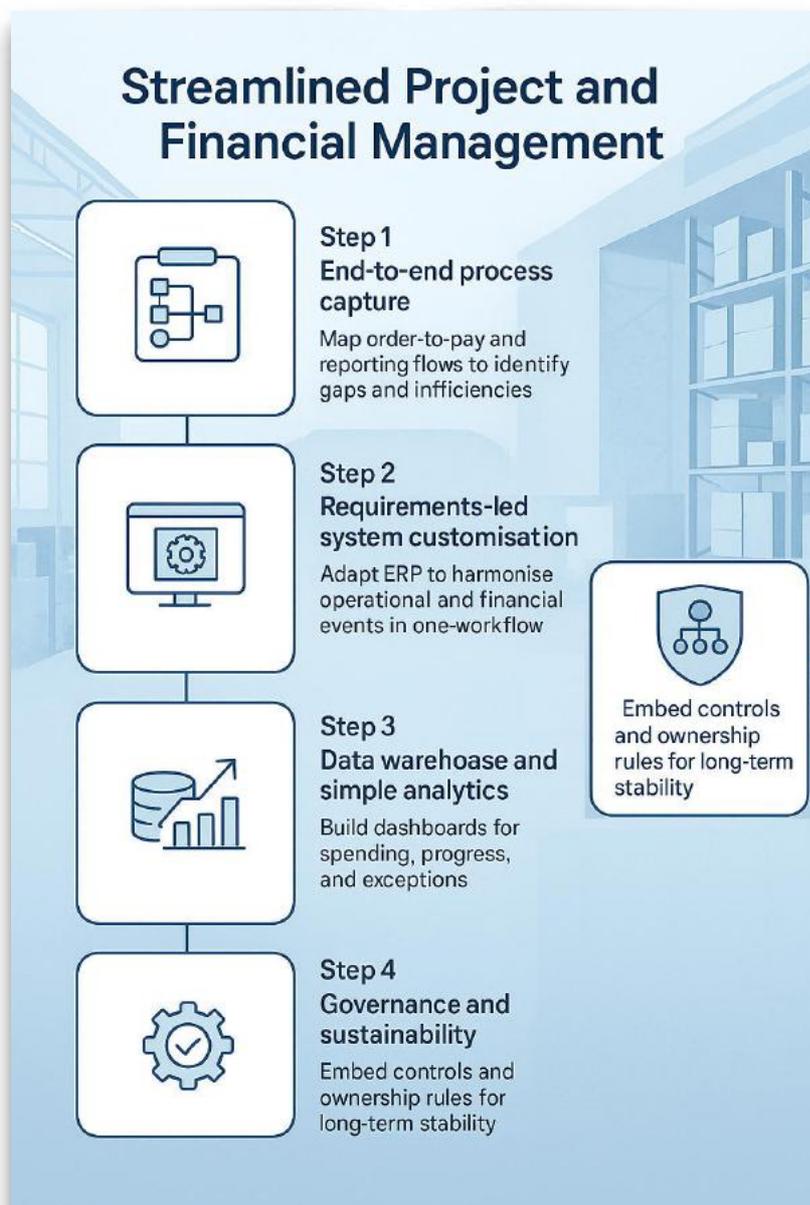
Build light-weight reporting extracts and dashboards for non-technical users, focusing on three core views: **project spend vs budget**, **milestone completion**, and **exceptions** (missing certificates, overdue supplier invoices).

## 4. Process rules and training

Introduce simple tolerance rules for reconciliations and a daily exception list for finance and project managers to act on. Deliver role-based training and short handover documentation.

## 5. Governance and sustainability

Embed a light governance framework to sustain controls.



# Outcome

## Achieved significant improvements in information management and process costs

- The client reported a measurable reduction in manual reconciliation and improved month-end reporting confidence with 50% improvement in systems speed and process costs.
- Faster payments to contractors owing to the removal of manual hold-ups and clearer evidence trails for milestone approvals.
- Project managers gained timely visibility of project progress and spend, enabling earlier corrective action and better stewardship of funds.
- The organisation strengthened its reporting to funders and auditors, improving transparency and the prospect of follow-on funding.

## Why This Matters for Utilities and Infrastructure Sponsors

- When delivery and finance live in different systems, projects slow down and governance suffers. Aligning the two with lightweight system changes and rules-based processes produces outsized improvements in speed, transparency and control – and reduces reputational risk for sponsors.

## Lessons and Transferability

- Small system changes that enforce single-source transaction recording are more effective and faster to deliver than wholesale replacements.
- Daily exception reporting is a low-cost control that vastly reduces month-end pressure.
- Role-based controls and short training programmes sustain change long after consultants leave.

