INNOVATION - H1

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THE INNOVATOR

I am a Systems Development Accountant with many years of NHS experience in Management Accounts, Patient Level Costing, Efficiency and Benchmarking

THE PROBLEM

The Management Accounts team **needs to** engage with the budget holders using the most user-friendly and efficient outputs **because otherwise** they can become overwhelmed with documents and information which can lead to disengagement and a lack of control of the financial position.

THE CHALLENGE

How might we empower the budget holders **so that** they engage with the depth of financial information available and support them to identify waste reduction?

THE INNOVATION

Traditionally a budget holder has, on a monthly basis, received pdf budget reports, excel pivot tables with pay, excel pivots with non pay, transactional details, forecast file, savings targets and so forth. This can be overwhelming and can contribute to the disengagement with their finances/finance team due to the time required and the inflexibility to link all the files together to identify trends.

I was able to create an interactive dashboard which provides all the information in one place. It is user friendly and the end user can identify trends and switch the variables easily. All the data is interlinked so it provides a powerful tool, something which does not currently exist based on what I know. The dashboard is aesthetically pleasing and very comprehensive. What used to be numerous rigid data files per month for each area cost centre, now is in one place going back to the start of the prior financial year. This makes analysis simple and the end user is able to identify trends from a very high level to a granular level.

THE LESSONS LEARNT

- I wouldn't underestimate the time taken to get the formatting and layout because it is an important aspect and the time taken delayed the project slightly.
- I learned the importance of good quality source data. Initially when data quality was not as good, the outputs could not be as powerful as they are currently and data took longer to manipulate into the format i needed. The source data improvement journey led to better outcomes, a quicker dashboard and saves time in refreshing dashboards.

THE OUTPUTS

The tangible products that came from the innovation was:

- Easy to update files

- Detailed trend analysis

- Ease of use for end user

THE OUTCOMES

The benefits to the organisation because of the innovation as a result of the innovation were that less time was spent by Management Accounts putting together data from various sources. The budget holders are more willing to engage with their financial figures irrelevant of their level of understanding of finance. A lot of data is available in one place and makes extraction easier.

THE QUICK WINS

- Create a simple dashboard with just a trial balance and this can be grown on as experience with PowerBI increases.

- Layout and design is important

- Liaise with end users to identify what outputs they want

THE REVIEWERS SAID

I THINK THIS IS A GREAT INNOVATION AND CAN TESTIFY TO THE POWER OF USING THESE KINDS OF DASHBOARDS FOR A MULTITUDE OF DIFFERENT DATASETS, NOT JUST FINANCIAL.

IT IS A GOOD INNOVATION THAT LINKS TO THE STRATEGIC THEME OF NHSX AND FINANCE COMMUNITY TO MAXIMISE USE OF DATA TO INFORM STRATEGIC DECISION MAKING.

I THINK THIS KIND OF REPORTING ALSO EMPOWERS FINANCE TEAMS AND FREES UP THEIR TIME TO FOCUS ON BIGGER ISSUES IN THE ORGANISATION RATHER THAN MANUALLY MANIPULATING DATA AND CREATING REPORTS.

WHAT YOU CAN DO NOW

If you recognise the problem stated and have implemented your own innovation to overcome it please submit this innovation to the programme and give others more examples to learn from.

SUBMIT INNOVATION

If you recognise the problem stated and would like to know more details about this innovation in particular, we will be hosting showcase and workshop sessions throughout the year, so all interested staff can gain ideas and inspiration from innovators in a manageable one-to-many format.

REGISTER INTEREST

If you have a problem but don't currently know of a solution to it, then please submit it here and in 2022 the Forum intends to crowdsource solutions to problems that don't currenlty have known innovations.

SUBMIT PROBLEM

If you would like to learn more about about the innovation programme please click below for more details

LEARN MORE

IN SEPTEMBER 2021 THE FORUM LAUNCHED...

- A national Innovation Programme for NHS Finance staff to submit their innovations for peer review. Successful innovations will be published and accessible to all on the One NHS Finance website
- A 'Software Skills For Finance Staff' event series taught by NHS Finance for NHS Finance including MS Excel, PowerBI, SQL etc.
- An 'Art of the Possible' briefing which explains two new technologies AI & Blockchain and discusses the opportunity for NHS Finance
- An Automation Group to review and improve the efficiency of existing national processes and returns

WHAT YOU CAN DO NOW

- Submit your innovations for peer review
- Sign up to be an innovation peer reviewer
- Read Art of the Possible
- Sign up for Software Skills for Finance
- Register your interest in automation and all things innovative

Innovation Programme	Software Skills	Automation sign up	Be a peer reviewer	Art of the Possible

FURTHER INFORMATION

Website: **FinanceInnovation.nhs.uk**

Email: **finance.innovation@nhs.net**

LinkedIn: **One NHS Finance**

Twitter: **@OneNHSFinance**

ONE NHS FINANCE

One NHS Finance brings together the Future-Focused Finance, National Finance Academy, and the Finance Innovation Forum programmes and networks to make sure that everyone working in NHS Finance has access to skills, knowledge, methods, and opportunities to influence and enhance patient services.

FINANCE INNOVATION FORUM

Identifying and developing innovative ways of working and new areas of improvement.