



## How Lutheran Disability Services recovered \$170,000 in transport costs and improved accuracy and efficiency

Australian non-profit Lutheran Disability Services uses Smartsheet to transform rostering, cost recovery, and their transportation schedule.

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Darren Button, Senior Finance Manager,  
Lutheran Disability Services



lutheran  
disability services

**Customer:**

Lutheran Disability Services

**Industry:**

Nonprofit

**Organization Size:**

Medium (50 - 999 employees)

**Region:**

APAC

**Website:**

[ldssa.org.au](http://ldssa.org.au)

### Customer Profile:

Headquartered in South Australia, Lutheran Disability Services is a not-for-profit organisation. Employing two hundred staff who provide 24-7 assistance, they help people with intellectual disabilities across accommodation support, independence, and community participation.

### Background:

Running a lifeline service doesn't come without its complexities. Headquartered in South Australia, Lutheran Disability Services are a not-for-profit organisation. From a trip to the bowling alley or completing a weekly shop, to providing round the clock accommodation support, Lutheran Disability Services play an integral part in enabling independence and community connectivity for people living with intellectual disabilities.

### Solution:

Lutheran Disability Services wanted to streamline their internal processes for transport billing and staff rostering. With disability funding in Australia regularly subject to policy change, cost recovery is a challenging task. Without a reliable process in place to manage the intricacies of the government grant system, LDS's bottom line was significantly impacted, and transport was a black hole in the profit sheet.

With regular, last-minute shift changes to manage across a couple hundred staff, inconsistent internal procedures also made rostering amendments difficult. Key details such as the staff member present were often incorrectly billed, impacting client satisfaction as a result.

Senior Finance Manager, Darren Button, turned to AC Consulting's Adrian Coulls, a long-time provider of IT services to Lutheran Disability Services and disability industry expert, keen to transform their processes and improve compliance. Button was convinced there had to be a simple solution, capable of revolutionising cost recovery and remedying their rostering problems. A long-time user of Smartsheet, Coulls already had just the platform in mind.

### Customer:

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## Time to simplify invoicing and improve roster management

Button heads a finance team who are tasked with navigating the complexities of the National Disability Insurance Scheme (NDIS) framework. Lutheran Disability Services provide government-funded services such as transport to their clients, who then claim these benefits independently.

Given the volume of journey data, finding an efficient billing solution based in a logbook or Excel wasn't sustainable for Button's team. *"Cost recovery is a complex landscape in disability services. As an organisation, we'd made the decision that it was too challenging to tackle recovering those costs, so we were effectively providing transport for nothing."*

In a 24-7 industry where last-minute shift changes are commonplace, Lutheran Disability Services also needed a robust rostering solution. If support worker shifts needed to be extended or changed, there wasn't a consistent system in which to record this, and the information was often lost. Working from complex spreadsheets whenever changes took place led to uncertainty for both Team Managers and Button's finance team, and ultimately impacted client satisfaction.

Discussing his team's unique situation with Coulls, Button was looking for a solution which could be easily accessed on the move by support workers.

## A simple process change with huge impact

To solve LDS's rostering issues, Coulls created a solution in Smartsheet. The team can now accurately capture real-time data from workers to share with leadership and finance. To avoid important shift data being missed, automation technology generates a daily email to pre-empt workers to declare roster changes ahead of time and keeps the Team Manager updated if approval is needed. In real-time, Team Managers are now aware that their client is subject to a roster change and, potentially, an invoicing change. By allowing the finance team to view a funnel of shift changes waiting to be approved, nothing is left behind in the process.

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**\$170,000**

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Lutheran Disability Services now use Smartsheet forms to manage billing. This allows each support worker to record trip particulars at the commencement of a journey. Because forms are easily accessible via smartphone, all staff now have a simple process at their fingertips and there's no risk of forgetting to detail the clients on board and the route taken.

*"By using forms, we've solved the problem of multi-person journeys, which makes invoicing each individual client easier." Where previous solutions didn't integrate well with Button's existing finance system, now Button simply exports data directly from Smartsheet.*

Button is pleased with how quickly the workforce got up to speed with Smartsheet. *"It's an older workforce who perhaps aren't as adept with smartphones, so we had some negative sentiment to begin with, but in reality it was really pretty smooth. We've had very few complaints which says a lot about how easy it was to implement a new process."*

## **\$170,000 of costs recovered but accuracy is the real win**

A reduction in costs is a significant win for the business, having recovered \$170,000 since implementing Smartsheet technology. This flows straight to the bottom line and allows Lutheran Disability Services to provide further services. Smartsheet use is also driving change in the sector. *"Interestingly, clients are getting more funding as there are more bills generated. Without the government knowing that the service exists, they can't budget and plan for it. The implementation has had sector-wide benefit,"* says Button.

Button and Coulls both agree that the biggest benefits are greater efficiency and having a robust system in place. While it's hard to accurately measure just how much time has been saved since its adoption, Button is pleased that Smartsheet has removed a lot of uncertainty and second guessing for his team. *"Customer satisfaction is the real win,"* he says. *"With a robust system, the team can justify their billings with data. "If it's challenged, it's defensible by data and this has made a huge difference."*

**Given the impact of 2020 on staffing, the usage of dashboards has also been a big help in adding irregular hours into the system. Forms have also proven beneficial in fleet management. With greater data available to the team, they are now more efficiently managing vehicle usage, with targeted forward planning for their vehicle leases and upgrades.**

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*"Since using Smartsheet, the only changes have been for the better,"* says Button.

## Planning for the future with Smartsheet

With these initial successes, the Lutheran Disability Services team are keen to further embed Smartsheet technology across the business.

Beyond the walls of Lutheran Disability Services, Button has recommended Smartsheet to peers in the industry. *"I'm sure we're not the only business impressed by how easy collaboration is with Smartsheet."*

Button is encouraged by the intuitive nature of Smartsheet. For a team tasked with managing a significant volume of data, the technology can be continually manipulated to the task at hand.

With further changes to the National Disability Insurance Scheme predicted, Coulls and Button will continue to work together to navigate challenges such as funding structures and changing income streams. Given the full impact of 2020 is unlikely to be felt by the industry until 2022, Button is happy to be one step ahead in using Smartsheet to manage reduced margins and stretched government budgets. *"We needed a solution that can adapt and evolve as these challenges arise. In Smartsheet, we have that."*

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