



SUCCESS STORY DEEP DIVE

iCatalyst delivers system-wide transformation for Catholic Education Western Australia (CEWA)

Catholic Education Western Australia (CEWA) needed to unify its finance systems after incorporating as a single legal entity in 2019. Its head office ran Oracle Cloud while schools used Microsoft Dynamics 365 Finance, creating fragmented processes and slow, manual reporting. Year-end consolidation took months using Excel workbooks across eight separate entities. CEWA needed a modern platform to improve data accuracy, facilitate more frequent reporting, and support compliance across its 151 schools and central office.

CEWA appointed iCatalyst through a competitive request for proposal (RFP) process, recognising the team's finance expertise and flexible approach. iCatalyst delivered Dynamics 365 Finance, Power BI reporting, Azure Integration Services, and ExFlow for AP automation. The team went a step further by creating a working demo environment early in the engagement, applying its Implementation

Methodology, which focuses on a process-first, interactive, in-system approach to design. This helped CEWA visualise the proposed solution, validate reporting outcomes, and build confidence in the implementation pathway.

The result is a unified finance platform that delivers consistent, real-time data across CEWA's entire system. Finance teams now complete month-end reporting in a fraction of the time, with reports that previously took up to five days refreshed instantly through Power BI. The ability to consolidate and validate data within a single platform has significantly improved accuracy, giving CEWA confidence in its financial information and reducing the risk of manual errors. Auditors can now access the data directly through self-service dashboards, and iCatalyst's managed service continues to strengthen the platform through ongoing automation, optimisation, and expanded reporting capabilities.

BUILDING A SOLUTION AROUND CEWA'S STRUCTURE AND GOALS

CEWA oversees 151 schools and a central office, each with varying levels of digital and financial maturity. The organisation needed a finance platform that could support this complexity, consolidate reporting across all entities, and operate within CEWA's established governance and delivery frameworks. Consistency, visibility, and alignment across the entire system were essential.

CEWA rolled out Microsoft Dynamics 365 Finance across its schools through a long-running implementation with multiple previous partners. The experience with the platform made staff hesitant to extend it further. Feedback raised concerns about the system's reporting capabilities and created uncertainty around whether it could meet the head office's broader requirements for auditing, compliance, and consolidated reporting.

CEWA invited proposals from several trusted Microsoft Solution Partners and selected iCatalyst for its finance expertise, flexible delivery model, and established internal relationships.

The key reason we chose iCatalyst was its ability to understand how CEWA operates and how to work with us effectively," said Grant Hardwick, Project Manager, CEWA. "The iCatalyst team didn't push a one-size-fits-all solution. They listened to what we needed and built a plan that matched."

iCatalyst engaged in detailed planning to build a solution that fit CEWA's structure from the outset. The team created a working demonstration environment during the design phase that mirrored CEWA's structure, including draft reports and a walkthrough of how Dynamics 365 could consolidate the organisation's eight business units into a single legal entity. This helped CEWA test reporting outputs, validate expectations, and shape requirements before moving ahead with implementation.

We needed something to help us visualise the system because we didn't know it well," said Patricia Jina, Senior Finance Lead, CEWA. "iCatalyst built demo reports and showed us what was possible before we even signed off. That really helped."



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DELIVERING CONFIDENCE IN THE SOLUTION

iCatalyst's early engagement gave the finance team confidence in the solution and set the foundation for a successful rollout. The additional time spent on design led to a smoother implementation process and reduced the need for rework later in the project.

"It's hard to imagine how a new system will work just from paper," said Patricia Jina. "The demo environment helped us get buy-in and refine our needs before committing to the build."

iCatalyst's work extended beyond system design. The team worked closely with CEWA to support internal resource gaps during the transition. This included helping with data preparation, developing custom Power BI reporting templates, and suggesting better ways to manage reconciliation and analysis.

Many team members were balancing their existing roles while trying to contribute to the implementation. iCatalyst stepped in to provide additional support, helping CEWA manage key deliverables while keeping the transformation on track.

The iCatalyst team always came up with ways to make the work easier and more efficient," said Patricia Jina. "They made it possible to keep everything running while we moved into the new solution."

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SUPPORTING DELIVERY WHERE IT MATTERED MOST

Data migration was one of the most critical areas of the project. CEWA needed to map historical financial data from its legacy ERP to the new chart of accounts in Dynamics 365.

This task required significant time and attention to detail. CEWA and iCatalyst agreed to prioritise accuracy and reliability throughout the process, even if that meant adjusting the delivery timeline.

“We wanted to do it right,” said Patricia Jina. “There was never a point where we were told to rush. We were given the time we needed to make sure the data would be reliable when we started reporting.”

iCatalyst also supported CEWA in delivering accounts payable automation using the ExFlow suite from SignUp Software. This moved CEWA from manual, paper-based invoice approvals to a streamlined digital process. Staff now receive invoice notifications via email and approve them through a secure online portal.

“The invoice approval process used to be manual,” said Grant Hardwick. “Now, it’s automated. Invoices appear in people’s inboxes, and they can click through to review and approve them easily.”

iCatalyst worked closely with CEWA’s teams throughout the engagement to identify areas where extra support would add value. The iCatalyst team

provided Power BI expertise, helped accelerate repetitive finance tasks with automation, and offered practical suggestions to reduce workload during the implementation.

“The iCatalyst team brought real-world finance experience to the table, especially when it came to data and reporting,” said Patricia Jina. “They understood how a finance team operates day to day and showed us best-practice processes within the system. That kind of practical insight made a real difference.”

CEWA also appreciated that iCatalyst stayed involved and treated the project as a shared responsibility. The team remained hands-on and engaged across everything from technical delivery to problem-solving. This active involvement made the engagement feel like a true partnership.

“It felt like they were part of our team,” said Patricia Jina. “They were always available, always helping, and they never made us feel like we were just one of many customers.”

“*Invoices appear in people’s inboxes, and they can click through to review and approve them easily.*”

“*The iCatalyst team brought real-world finance experience to the table.*”



LAYING THE GROUNDWORK FOR FUTURE TRANSFORMATION

CEWA has shifted from annual, spreadsheet-heavy reporting to a streamlined, system-driven process, now that Dynamics 365 Finance is in place. The finance team can deliver quarterly management reports—a first for the organisation—and provide board-level insights within days rather than months. This change has significantly improved data accuracy, timeliness, and confidence in the information used for decision-making.

“We used to spend three-to-five days building the monthly finance report for head office,” said Patricia Jina. “Now, it’s a click of a button. We can instantly refresh the Power BI report if we need to make a last-minute journal adjustment.”

The year-end process has seen similar gains, with the team completing the year-end process in just a few days for the first time. CEWA previously prepared approximately 150 separate Excel workbooks to consolidate school data. That task was once prone to delays and manual errors, though it is now fully system based. CEWA pulls the data directly from Dynamics 365 and validates it using live Power BI reports.

CEWA’s auditors now have direct access to the data through a secure portal, reducing the need for the finance team to respond to manual data requests. This

improves transparency and compliance, while freeing internal teams to focus on analysis rather than reconciliation.

CEWA’s platform also supports broader system-wide goals beyond reporting. The finance transformation introduced new budgeting processes across the organisation and created a foundation for upcoming procurement and capital project initiatives. CEWA can reuse existing integrations and accelerate the delivery of future systems now that head office and schools share a common platform.

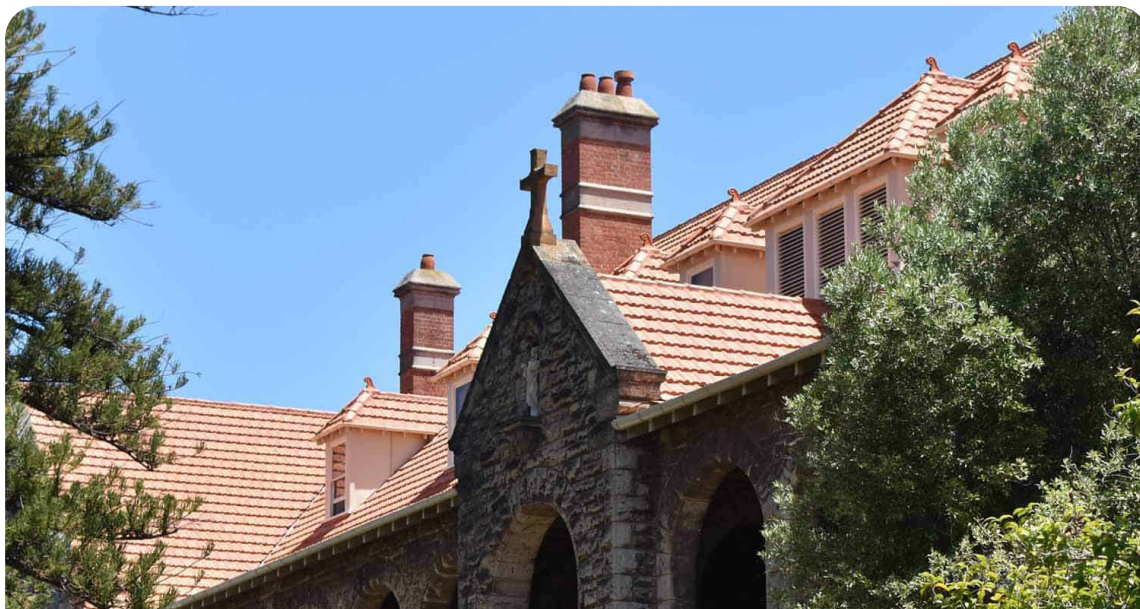
“It was the cornerstone project,” said Grant Hardwick. “It gave CEWA the shared foundation we needed. Now, we can build on that and take advantage of the platform across other projects.”

The partnership with iCatalyst remains ongoing, with CEWA continuing to access the team’s expertise through Managed Services, Support, and Minor Works. The system continues to evolve, with new reports in development to meet emerging organisational needs.

“We’ve built a strong relationship with iCatalyst. The company has stayed engaged, supported us at every step, and continues to work closely with us as we improve and expand the system,” said Patricia Jina. “It feels like they’re part of our team.”

SOLUTIONS AND SERVICES DELIVERED:

- Microsoft Dynamics 365 Finance implementation
- Power BI financial reporting templates
- Azure Integration Services and data warehouse connection
- ExFlow AP automation
- Ongoing managed services and support



FEATURED CUSTOMER – CATHOLIC EDUCATION WESTERN AUSTRALIA (CEWA)

Catholic Education Western Australia (CEWA) is a state-wide system comprising 151 schools, colleges, and early years learning and care facilities.

These schools operate across the Dioceses of Broome, Bunbury, and Geraldton, as well as the Archdiocese of Perth. CEWA provides centralised services in education, finance, administration, and digital technology to ensure consistency and equity across all schools, regardless of size or location. The organisation supports day-to-day operations while leading strategic initiatives to improve learning outcomes and organisational performance.

For more information, visit cewa.edu.au.

Contact our team today.