



WORK FORWARD.



Grow Your Business Kit

Thank you for considering a Microsoft Dynamics solution for your business. This kit contains resources to help you learn more about how enterprise applications can help companies like yours work forward.

The Grow Your Business Resource Kit includes:

- Information from independent research firms about how business applications can help transform the way you work and drive business success
- Additional resources from Microsoft about how our business solutions can help small and mid-sized businesses, including detail about deployment options and real-life customer success stories
- Below you will find an abstract of the resources we have collected for you in the Grow Your Business Kit. Review the summaries and click the hyper-links to access the full content.

Third-Party White Papers

[Is Your Business Ready for ERP?](#) This white paper from *Focus Research* can help you evaluate whether your growing business is ready for Enterprise Resource Planning (ERP) and how you can improve business performance by deploying the right ERP solution. You will also learn what to expect in an ERP solution and how to determine which model is the best fit for your business.

[Guidebook: Microsoft Dynamics Enterprise Applications for Small and Mid-Sized Businesses.](#) *Nucleus Research* provides an overview of how the changing business landscape offers opportunity for small and mid-sized businesses (SMBs). This white paper will help you become familiar with how the rise of cloud computing, consumerization of IT, and business process outsourcing are altering the way people and businesses work. Nucleus Research summarizes how changes with the delivery, access, adoption, and integration of business solutions are creating new opportunities for SMBs and how a business solution from Microsoft can help you take advantage of them.

Microsoft Dynamics Resources

Looking for a ways to help your people be more proactive and productive, stand out from your competition, and transform your business? Read the [Top Reasons to Purchase a Business Solution From Microsoft](#) to learn how Microsoft Dynamics ERP can help you do that and more!

What is the best way to deploy an Enterprise Resource Planning (ERP) for your business? Should it be in the cloud, on-premises, or a combination of the two? [The Microsoft Dynamics ERP Deployment Guide](#) can help you assess the options and decide which model is right for your business.

Customer Success Stories

See for yourself how Microsoft Dynamics is helping small and mid-sized businesses gain greater control, drive bottom line results, and grow their businesses. More than three million users from a wide range of industries count on Microsoft Dynamics to drive their business forward. Here are stories from a small sample of customers:

- [Urban Ministries, Inc.](#), a 41-person publishing company, used Microsoft Dynamics ERP and Microsoft Dynamics CRM to achieve new efficiencies and reach new market segments.
- [Klasik Moto](#), a motor vehicle and motorcycle parts distributor in the Czech Republic, found Microsoft Dynamics increased their budget efficiency by 100% and lowered discount expenditures by 50%.
- [Kauffman Center for the Performing Arts](#) deployed a cloud-based Microsoft Dynamics solution and saved more than US\$600,000 in its operations in three years.
- [Billund Airport](#), the second largest airport in Denmark, improved retail revenue by 10% and paid back its investment in Microsoft Dynamics ERP within a year.

Let us help you get started with Microsoft Dynamics

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Is Your Business Ready for ERP?

Focus Research
July 2011

Focus Adviser: Brian Sommer

Is Your Business Ready for ERP?

Executive Summary

Most firms begin as small businesses. As time goes by, a percentage of these firms grow and some grow very large. To drive and sustain this growth, they need an effective ERP system to manage their business.

When small businesses must confront change, they often face challenges to the capital structure, staffing, marketing and even technology aspects of their firm. While the smallest businesses may be able to exist with spreadsheet-based or entry-level accounting software, growing enterprises will want to adopt new technologies that are better suited for the increasing business challenges that a growing, larger firm is encountering. It is at this juncture that small businesses will consider ERP (enterprise resource planning) software. This white paper examines four key questions:

- How do we know we need a new ERP system?
- What delivery models are available for ERP software today?
- What are most important factors to consider in a modern ERP selection?
- What are the potential benefits to accrue to our firm with the new solution?

When Basic ERP or Spreadsheets Will Not Do

Small businesses will need a more comprehensive and functionally more powerful software solution when any one of several indicators is present. These include:

Headcount has grown, yet management can no longer oversee and control all personnel and functions. Often the owners/managers of small businesses can stay on top of all manner of financial and operational issues simply because of their full-time presence at the company and their close working relationship with their employees. But, as companies grow in size and take on ever larger numbers of employees, the owners/managers cannot adequately supervise the activities of every single employee. This is a critical juncture in the evolution of the business, as it indicates the need for the company to adopt more stringent controls so that the potential for fraud, poor customer service, supply chain disruption or other adverse business outcomes are reduced.

The time required to enter, update and/or reconcile information and current systems is growing out of proportion to the growth rate the company is encountering. In a nutshell, simple systems, like that of a spreadsheet, work best for simple business environments. As a small business evolves into a larger, possibly midmarket firm, it needs systems that were designed to reduce errors, increase worker efficiencies and worker effectiveness.

The simplest solutions on the market often fail to support some of the basic industry functionality a growing firm may need. As firms grow, nuances within certain business functions become ever more critical to the business and must be addressed appropriately. For example, a Midwest metals processing firm migrated from a very basic small business system to an SMB (small to midsize business) ERP solution because of the old software's inability to handle inventory and inventory variances. Many small business solutions may come preconfigured with a number of different charts of accounts for different industries; however, this is not the same as providing deeper vertical industry functionality (e.g., manufacturing scheduling or warehouse picking). New ERP systems, at this stage of a business's evolution, are often required because of the growing and significant vertical industry business requirements. These ERP solutions often possess this critical industry functionality and, even if some of this is lacking, these new solutions permit additional tailoring or customization, if so required.

Businesses may upgrade to ERP solutions because of new requirements or pressures from third parties such as bankers, taxing authorities or board members. These entities may not accept financial statements or other documentation prepared on systems, such as spreadsheets, that lack the controls and balancing rigor found in more advanced software offerings.

Other stakeholders, such as suppliers or customers, may trigger the need for the company to acquire a full-blown ERP solution. A small business may find stakeholders up and down the value chain demanding the company upgrade its software. These stakeholders tire easily when they are not paid correctly or in a timely fashion. They want to receive accurate bills and invoices. Overall, they want to deal with a more professional, efficient and effective firm.

When SMBs Use ERP Software

When a company graduates from its first software starter set to an ERP solution, the business owners/managers should be prepared for a number of changes that will impact their firm. These changes will be, for the most part, positive for the company and help prepare it for additional long-term growth.

Startups and other small businesses often lack well-defined processes, roles and workflows. It's not unusual to see these businesses staffed by numerous workers that act as jacks-of-all-trades. This is at the core of what makes so many small businesses successful: that is, these companies have individuals who are always willing to roll up their sleeves and dive into any aspect of the company to keep its fortunes positive.

But as the company grows, work and work processes will undoubtedly need to be better defined and better controlled. As a business grows, it needs to find greater reliability, higher efficiency and increasing effectiveness of all of its workers and work processes. ERP solutions are especially well suited for this type of environment. One CEO of a midmarket school supply company indicated that the company's only major internal fraud occurred before it brought in new ERP software and the attendant controls it put in place. This CEO advises other growing small businesses to never underestimate how vulnerable businesses are to such risks.

But as mentioned previously, there is another reason for having these well-defined roles and processes. These processes provide for tighter controls over payments, shipping, vendor choices, hiring decisions and so forth by defining the limits of authority and separation of duties. Fraud, embezzlement and other adverse business outcomes can be substantially eliminated in many firms with better software. These additional controls also provide a means of having others perform checks and balances on other people's work so as to free up the owners/managers to drive business growth. When owners/managers spend all of their time overseeing, they aren't focused on growing the firm.

New ERP software users should be prepared to be very flexible in designing and implementing new work processes and new controls. Business practices and methods that may have served the company well historically may not have been optimal or may no longer be optimal for the size of business that the company has become. Additionally, new

ERP and Small Businesses

Why did your company adopt an ERP system?

Process integration	54%
Resolve order processing issues	50%
Hardware & software obsolescence	50%
Resolve data duplication & inconsistencies	38%
Reduce stock/inventory excess	35%

Source: "Exploring the use of ERP systems by SMEs" by M. Tagliavini, P. Faverio, A. Ravarini, F. Pigni, G. Buonanno
http://www.apertus.com/downloads/Exploring_the_use_of_ERP_systems_by_SMEs.pdf

ERP software may showcase opportunities for the small business to utilize capabilities such as smartphones and third-party data in application areas that had no corresponding place in the business previously. While human beings generally loathe change, new ERP software will undoubtedly trigger new levels of business performance if owners/managers are open to and supportive of these changes.

What You Should Expect in an ERP Solution

ERP software is rich in functionality. Most solutions offer substantial cross-industry functionality and many options to complete specific tasks. A typical solution contains the following cross-industry modules:

- | | |
|--------------------------------------|------------------------------------|
| ▪ General Ledger | ▪ Payroll |
| ▪ Accounts Payable (Purchase Ledger) | ▪ Human Resources |
| ▪ Purchase Order | ▪ Customer Relationship Management |
| ▪ Accounts Receivable (Sales Ledger) | ▪ Management Reporting |
| ▪ Fixed Assets | ▪ Analytics/Business Intelligence |

Other cross-industry modules that may be offered include:

- | | |
|--------------------------|------------------------------------|
| ▪ Inventory | ▪ Talent Management |
| ▪ Capital Projects | ▪ Billing |
| ▪ Credit and Collections | ▪ Order Entry |
| ▪ Consolidation | ▪ Supplier Relationship Management |
| | ▪ And more |

Beyond these cross-industry modules, many ERP vendors offer additional functionality to support numerous vertical industries. The most commonly supported verticals are in manufacturing and distribution industries, although a number of products have been created to support service industries, too.

What is contained within an ERP application software suite continues to expand. Today's more modern products include support for:

- significant numbers of business best practices
- tight integration with office automation productivity suites
- embedded collaboration technologies to facilitate the sharing of ideas, documents and so forth among workers and key external stakeholders such as suppliers, recruits and customers
- new technologies such as mobile telephony, social networking and more

For example, software buyers will want to examine the support of key applications, like sales force automation, with the different smartphones used by their employees today. The user interface on the device should be intuitive, relevant for the form factor of the device itself and contain the data and functionality needed by today's mobile, interconnected workers.

Newer ERP products also offer advanced analytic capabilities. While sometimes marketed as business intelligence, these tools are bringing together information from inside and outside the enterprise. The result of this is that analytic applications are capable of providing great insights into prospective customers, a company's supply base and so forth. Not only are these analytic applications producing great productivity aids for workers, they are also enabling

businesses to more quickly react to changing business conditions. Like the adage, “time is money”, faster access to critical business trend information can mean millions in dollars of value to companies.

There are many benefits newer ERP systems can deliver. Some companies will experience lower implementation risk simply because of the availability of new cloud-based delivery models. Many products have made substantial improvements to the user interface. That change is lessening the training workload on IT as it rolls out newer upgrades or mobile versions of the ERP solution. New integration couplers are expediting the integration of new ERP solutions to other business applications.

Approximately 47% of small business owners send text messages to their customers. 36% of small businesses send status updates via mobile devices

(Rockbridge Associates, Inc., 2011)

When businesses implement ERP software, they should seek savings and benefits beyond just automation of manual processes and the efficiencies these produce. New ERP software should also help a firm achieve one of more of the following, too:

- increased sales
- improved sales force effectiveness
- improved sales closure rates
- reduced sales abandonment rates
- increased working capital
- faster cash collections
- increased inventory turns
- decreased inventory on hand
- reduced stock outs
- increased average order size
- reduced shrinkage
- reduced production costs
- reduced sales discounts
- etc.

Making a Smart ERP Selection Decision

ERP software decisions are business, technical, financial, political, process and organizational decisions. Because these solutions are broad in their scope and reach deep within the organization, owners/managers of small businesses should involve a broad-based group of employees in any selection effort.

Before any vendors are contacted, a business should identify individuals within their company whom they believe can lead an open-minded and fair software evaluation effort. This core group of individuals should be charged with performing some initial research as to the types of solutions that are available in the market generally and creating a long list of potential vendors the company should consider. This long list of vendors should contain software products that are relevant for: the company's size; the vertical industry the company operates in; the delivery method and software solutions the company may desire; the level of local and software vendor support desired; and other critical factors.

This evaluation team should research the ERP software marketplace further so that it can whittle down the long list of vendors to a short list of approximately two to three software solutions. As part of this research, the evaluation team should review the websites of long list vendors. They should request customer interviews and case studies and check the references of appropriate implementers or resellers as required. Basic questions such as software pricing and functional/industry availability should be answered at this stage. Once the research is complete, the evaluation team should brief the owners/managers of their findings and present two to three vendors for additional, detailed evaluation.

The evaluation team should consult with the company's accountants to ensure that they have experience with this software package and/or agree with the choice of vendors on the short list.

The most important criterion the valuation team will need to assess will be the risk associated with any given product and its implementation. No business ever wants to face a disruption in its business in activities due to a software issue. As result, a software evaluation team must make risk management and risk mitigation key priorities in evaluating different solutions, different implementation methods, different delivery methods and different implementers.

New ERP Delivery Models

Generally speaking, ERP software can be delivered in three broad methods: on-premise, cloud and hybrid methods:

1. **On-premise** delivery models assume that businesses will license ERP software and install it on computers at their location. ERP software users are responsible for buying computer hardware and software for these solutions. They are also responsible for applying any software upgrades, patches or fixes provided by the software vendor.
2. **Cloud** delivery models allow the software user to use application software on another firm's computing equipment. There are many different kinds of cloud delivery models though. Some simply provide a place for the software to run. Some clouds are run and operated by ERP vendors. Is cloud cheaper? It can be if the cloud provider also supplies the database software, security software, backup and other critical technologies.

The most straightforward cloud solution is the hosted application. In this situation, a software vendor makes its on-premise software available on a third-party's cloud data center. Within this environment, customers do not have to acquire computer servers and other key computing hardware. Depending on the solution, some of these cloud solutions may not require the customer to acquire database licenses or systems management software as these may be bundled into the offering. The key benefit of this delivery method is to help eliminate large up-front computer hardware purchases on the part of a customer. Pricing for these solutions is often done on a monthly basis and may scale up or down based on a customer's usage of the product. Another benefit of this delivery model is that the customer retains control over the application of upgrades, patches and fixes. This is due to the customer having its own copy of the software. This approach affords lots of control and permits the user to make extensive modifications to the product. However, the customer will likely face higher maintenance costs as the customer will need to apply all changes to the software.

Some cloud solutions are multi-tenant. In a multi-tenant solution, only one copy of the software is used by many customers concurrently, yet their data is kept separated. The key benefit to this is that software upgrades and maintenance are provided by the software vendor and are implemented simultaneously for all customers. This environment means that software users do not have to perform software maintenance and upgrade activities with their own internal staff. This could save some small businesses from needing to hire additional IT personnel to support their ERP software.

3. **Hybrid** solutions represent the third kind of delivery model. In a hybrid environment, software vendors may offer multiple methods for deploying the software. It can be used on-premise, hosted on the vendor's cloud or on another firm's cloud. These solutions may also possess the flexibility to be initially implemented on a cloud and subsequently moved back to a customer's own data center. This flexibility in going from on-demand to on-premise (and in some cases back to on-demand) gives companies the ability to bring an application in-house should they anticipate the need to make modifications that exceed the capabilities of the standard cloud offering.

Some hybrid ERP solutions can take a different form. For example, a vendor could offer certain of its modules (e.g., general ledger) as an on-premise application while other applications (e.g., customer relationship management) are offered as hosted or on-demand solutions. These products are often designed to work together even though some ERP functionality and data may reside on the customer's data center while other data and functionality resides on a cloud environment.

Conclusion

- As small businesses grow, they will need newer, richer ERP software technology.
- For those firms evaluating new solutions now, be advised that ERP solutions have undergone significant changes in recent years and more changes (e.g., delivery models, support for mobile devices) are likely to come.
- ERP software selections should involve several people within a company, each conducting research on potential solutions and delivery models.
- Benefits of ERP software will likely include process efficiencies, but may also include better controls, lower business risks and significant operational and financial improvements.
- Smart ERP software buyers will want to spend time understanding the process and workflow implications of potential new solutions.

About Vital Analysis

Vital Analysis is a very different kind of technology research organization. We are the intersection set where exceptional technology market knowledge meets the executive suite. Where other 'analysts' replay vendor press releases, we give you the:

- impact new technologies will or won't have on your business
- reasons why you should or shouldn't care about specific emerging solutions
- business justifications why you may or may not want specific solutions

Vital Analysis was carved out of TechVentive, Inc. in 2007 as a new, but complementary business. As designed, Vital Analysis is the publishing, research and analytical arm of that company.

Our reach, like our blog readership, is truly global. We've consulted with top technology executives in Australia, Brazil, Canada, United Kingdom and the United States. We've been briefed by technology providers from virtually every corner of the planet.

About the Author

Brian Sommer is the CEO of TechVentive, Inc., a market-strategy and content firm. Brian closely follows what C-level executives think, feel and need. Brian also publishes a blog on the intersection of application software and professional services (<http://blogs.zdnet.com/sommer/>). He welcomes your thoughts and invites you to contact him at brian@vitalanalysis.com.

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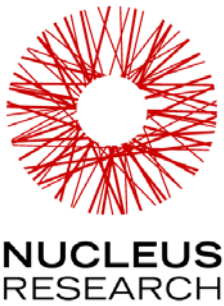
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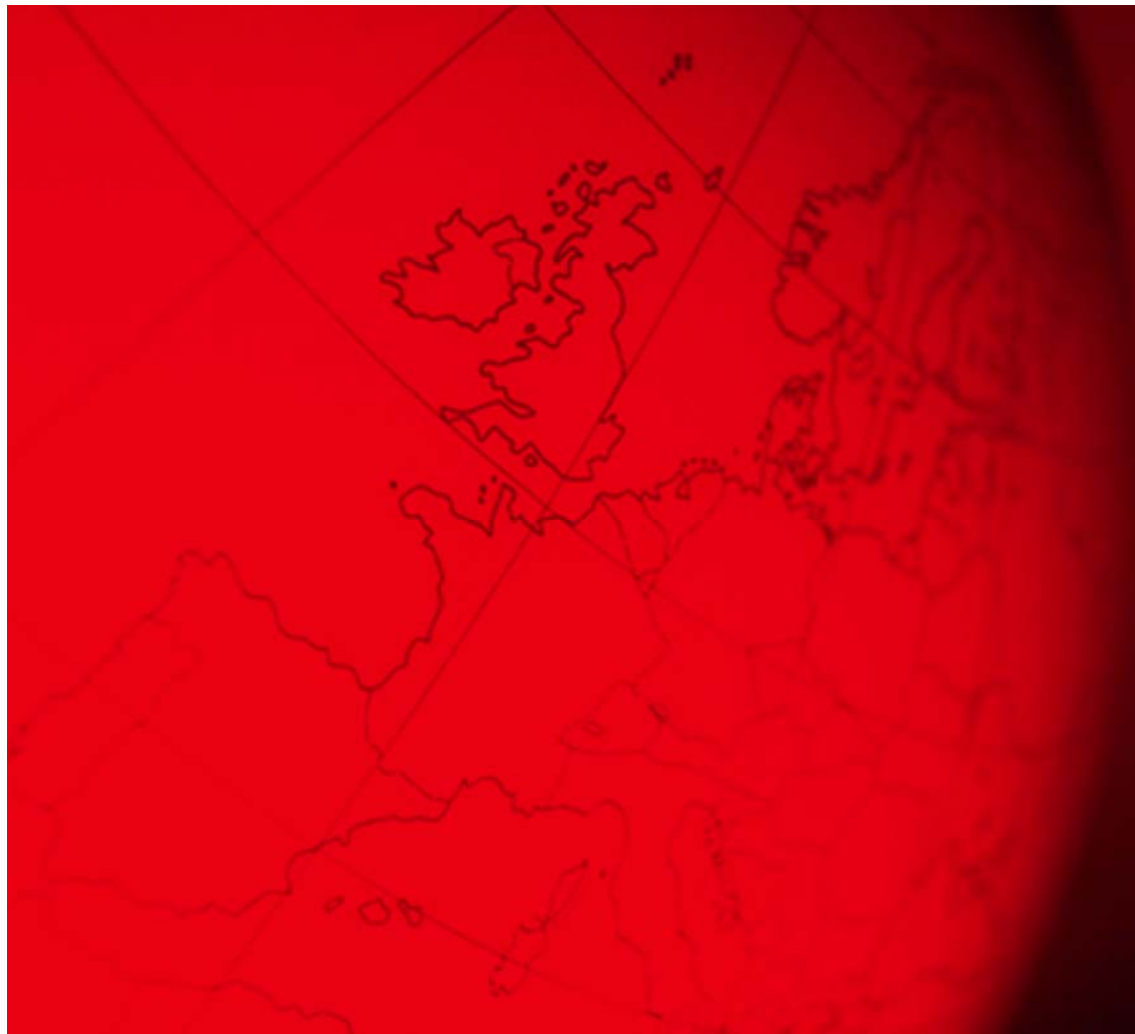


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GUIDEBOOK

MICROSOFT DYNAMICS ENTERPRISE APPLICATIONS FOR SMBS



THE BOTTOM LINE

The landscape of enterprise applications is changing, and so are the opportunities and challenges for small and medium-sized businesses (SMBs). Nucleus has found SMBs today are focused on increasing business visibility, reducing manual processes, and making employees more productive. In its analysis of Microsoft Dynamics SMB customers, Nucleus found they consistently cited integration, usability, and cloud delivery as key factors that helped them grow their businesses while managing costs.

OVERVIEW

Microsoft Dynamics, Microsoft's business solutions division, provides business solutions designed for companies of all sizes, including SMBs, midmarket firms, and enterprises. They include functionality to support finance and accounting, human resources, manufacturing, supply chain management, project management, and customer relationship management. In its ongoing analysis of Microsoft Dynamics, Nucleus has found Microsoft has made significant steps in the past few years to make Dynamics business applications easier to use and less costly to support (Nucleus Research *m28 – Microsoft Convergence 2012*, March 2012) including:

- Leveraging existing Microsoft technologies and capabilities such as analytics, collaboration, and communication
- Providing cloud support and delivery options through Microsoft and Microsoft partners
- Investing in usability including role-based views, mobile access, and a more intuitive interface
- Investing in rapid implementation tools to reduce the time and cost associated with configuring and delivering Dynamics solutions

This Guidebook focuses on the experiences of SMBs who have adopted Microsoft technologies and Microsoft Dynamics enterprise applications to increase employee productivity; manage their prospects, customers, and business operations; and gain greater visibility into their operations for better decision making.

THE SITUATION

The landscape of enterprise applications is changing — and so are the opportunities for small and medium-sized organizations. In its ongoing coverage of the enterprise applications market over the past several years, Nucleus has found that:

- The rise of cloud computing has provided SMBs with more cost-effective and flexible options for enterprise applications, and enabled them to support remote and traveling employees and contractors. In fact, cloud computing has also enabled SMBs

to take advantage of business process outsourcing so they can focus their internal resources on the core areas of their business.

- The consumerization of technology has driven greater end-user expectations for IT, even for SMBs with limited IT resources. It has also blurred the line between personal and work computing. This means users expect the applications they use at work to be as intuitive to use and fast to learn as consumer applications, and they expect their company's IT department to support their personal devices.
- Mobile device access has become not just a "nice to have" but a necessary differentiator for enterprise applications. This is particularly true for SMB managers who may have multiple responsibilities within the organization and be on the critical path for workflow approvals. Mobile device access can enable them to be more productive in clearing back-office transactions while they are working with clients or traveling.
- Enterprise applications have evolved beyond transaction processing to focus on end-user productivity. This means enterprise applications must present information based on the role or task of the individual user and must increasingly be integrated with other applications like collaboration and analytics that help users complete the task at hand with a minimal number of click-throughs. This enables users to be more productive and reduces technology training costs and ramp-up time.

Nucleus took a closer look at Microsoft Dynamics SMB customers to understand how these trends impact decision making, adoption, and ongoing management of enterprise applications.

CLOUD DELIVERY

Nucleus has found that SMBs have increasingly adopted cloud-based or software-as-a-service (SaaS) applications for a number of reasons. Cloud options reduce the initial and ongoing cost of deploying and supporting enterprise applications, making them more affordable options for SMBs with limited IT resources. In many cases, Nucleus has found business managers without an IT background can develop the skills to configure and manage ongoing changes in cloud-based enterprise applications. This puts automation within reach of SMBs, driving greater productivity.

Because cloud applications can be rapidly deployed to meet business needs today and expanded or adapted over time, they are less disruptive to deploy: business managers can focus on one area to automate, such as customer management or accounting, and then turn on other capabilities over time as needed. Cloud applications can also be accessed by end users at any location with any device, which is an important productivity driver for organizations like the Kauffman Center for the Performing Arts.

Customer example: Kauffman Center for the Performing Arts

The Kauffman Center for the Performing Arts in Kansas City, Missouri, opened in October 2011 and has a team of 30 employees to manage the Center's core business operations.

The Center outsources many other functions such as security, building engineering services, janitorial services, and IT services. Although the Center initially managed its finances with QuickBooks, as it grew it recognized the need to support more complex financial management and reporting capabilities. Working with a Microsoft partner, it selected a hosted Microsoft Dynamics application which is integrated with Microsoft SharePoint Services for file and content sharing, Microsoft Exchange Server and Outlook for e-mail communications and collaboration, and Microsoft Dynamics Retail Management System for point-of-sale transactions. Kauffman Center employees can access the hosted applications from any location using a Web browser and their laptop, tablet, or smart phone. Nucleus found benefits from the project included increased productivity and an estimated technology cost savings of approximately \$200,000 per year.

Customer example: May's Mission

For more than 35 years, Mays Mission for the Handicapped has provided employment opportunities, scholarships, emergency monetary assistance, and other services to people with disabilities. It also trains disabled individuals in graphics arts, printing, and other skills and sells their products to corporate clients.

Like many SMBs, Mays Mission had limited IT resources and a limited budget. It had been a Microsoft Dynamics client for many years, but given the changing enterprise application landscape, it decided to move its enterprise application to the cloud in 2010 using a Dynamics solution hosted by a partner. In addition to reduced costs, Mays Mission can leverage the other advantages of the cloud including:

- Increased flexibility and productivity. Because users can access the application from anywhere, they can work from home or any location.
- Data security. Before moving to the cloud, the Mission had to manually back up its data to a local DVD on a daily basis to ensure it wouldn't lose data. Now the data is backed up transparently in the cloud and managed by the Microsoft partner.
- Improved auditability. Because auditors now receive a digital report from Mays, they can more quickly access the information they need to complete year-end audits.
- Reduced costs. By moving to the cloud and a subscription-based model, Mays Mission was able to avoid the one-time costs of upgrading its software and also reduced ongoing support expenses because updates are performed by the partner.

"In smaller organizations, people do more than just one job, because you can't hire one person for only a few hours of work. I'm president but also executive director, and I do the accounting too. Remote access is really nice – I can work from home if I need to or access [the application] from the road if I need to. Now I'm not tied to the office."

- Sherry Niehaus, President and Executive Director, Mays Mission for the Handicapped

MOBILE ACCESS

As end users have adopted mobile devices and become used to downloading applications to those devices, they expect the same mobile access capabilities from their enterprise

applications. In its Market Focus Report on customer relationship management, Nucleus found that 74 percent of companies had enabled mobile device access to enterprise applications such as CRM – driving an average increase in productivity of 14.6 percent for sales people (Nucleus Research *m13 - Market Focus Report: The Value of Mobile and Social for CRM*, March 2012).

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Microsoft made significant advances in its support for mobile devices with its Microsoft Dynamics CRM Q2 2012 service update, adding native mobile client support for Windows Phone 7, Apple iPad and iPhone, and Android and BlackBerry mobile devices as well as support for more Web browsers including Internet Explorer, Chrome, Firefox, and Safari running on PCs, Macintoshes, and iPads (Nucleus Research *m15 - Microsoft Dynamics CRM Q2 2012 service update*, February 2012).

Customer example: Sybron Dental

Sybron Dental Specialties is a manufacturer of high-technology dental, dental implant, and infection prevention products based in Orange County, California. Nucleus found its use of Microsoft Dynamics CRM and a custom-developed iPhone application gave sales people an initial productivity boost. The company has expanded its iPhone application to the iPad and added functionality as well, including device-appropriate reporting screens and integrated geomapping that enables sales people to identify and visit prospects in their immediate area when they have extra availability.

USABILITY

Usability has always been a key differentiator for Microsoft Dynamics applications, and Microsoft has continued to make improvements to make Dynamics applications more intuitive and easy to adopt, including role-based views, integration with Microsoft Office and SharePoint Portal Server, and delivery of the Metro user interface. In many cases, Nucleus has found that SMBs are moving from a combination of spreadsheets, manual processes, and paper when they adopt Microsoft Dynamics applications. Simply having one centralized point to gather transactional data and automate processes can help SMBs to grow without adding a proportionate number of new employees.

In fact, in looking at small manufacturers, Nucleus found companies adopting a common source of information such as a Microsoft Dynamics application can reduce the amount of time spent manually rekeying or verifying information, driving an up to 20 percent increase in user productivity. In some cases, Nucleus found Dynamics enterprise application customers were able to grow revenues by more than double without a corresponding increase in administrative staff (Nucleus Research *k2 - The value of Microsoft Dynamics NAV for manufacturers*, January 2010).

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INTEGRATION AND ANALYTICS

As Microsoft Dynamics applications have advanced, so have their integration and analytics capabilities. Nucleus has found that this drives reduced IT-related reporting costs, better decision making, and the ability to more broadly share key information across an organizations' employees – particularly if not all of them have regular access to Microsoft Dynamics applications. Nucleus has also found that visibility into data can be a core differentiator for SMBs. Until recently, that kind of analytical capability has often been too costly and resource-intensive to justify for SMBs. Today, business analytics capabilities within Microsoft Dynamics enables business users to create, adapt, and run their own reports at little or no additional training and no additional license cost.

Customer example: Ahmad Tea

Ahmad Tea of London is a family-owned tea business that differentiates itself in a competitive market by providing only the best quality teas in unique packaging. Founded in 1986 in the United Kingdom, the company has grown to export its product to more than 70 countries on six continents. In 2001, the company decided to move from a Sage accounting package to an application that is now part of the Microsoft Dynamics solution portfolio because it wanted a flexible ERP solution that it could expand over time as its needs changed. The company has 70 employees in the United Kingdom and operations in London, Sri Lanka, Dubai, Ras Al Khaimah in the UAE, China, Russia, and the Ukraine. Over time, Ahmad Tea has expanded its use of Dynamics including:

- Expanding its Sri Lanka deployment with the application's manufacturing capabilities
- Adding warehouse management capabilities to its UK deployment
- Taking advantage of Dynamics applications' business intelligence capabilities to better understand changes in the marketplace and how it should position itself for growth.

For a company like Ahmad Tea, usability and adaptability are keys to their success with ERP. Nucleus has found this is particularly important in SMBs where employees often have multiple roles. Because they don't access the same part of the application or the same report every day, an application has to be intuitive enough that they don't have to re-learn how to use a different screen when they need to use it.

"The market is changing all the time and people's tastes are becoming more refined. Competition is as intense as ever, and some of the smaller players in the market are getting squeezed out. Dynamics gives us a backbone and software system that supports various portions of the business, and Dynamics and business analytics give us information that helps us identify what's happening in the marketplace and where we're going in the future."

- Peter Jacob, Ahmad Tea

Nucleus found key benefits from Microsoft Dynamics applications and business analytics for Ahmad Tea included increased visibility, increased productivity, and increased competitive advantage.

Customer example: Quint Wellington Redwood

Quint Wellington Redwood is a global company specializing in world-class IT management solutions and has projects in 49 countries and offices in 12 countries. In analyzing its deployment of Microsoft Dynamics enterprise applications, Nucleus found Quint was able to work with a Microsoft Dynamics partner to

- integrate its centralized billing system with its Microsoft Dynamics application
- take advantage of Dynamics remote access capabilities to enable users from offices around the world to connect directly to the Microsoft Dynamics applications.

This enabled Quint to reduce third-party software costs, increase end-user productivity, and provide managers with more accurate information for decision making.

"Now all the invoices and transactions are updated automatically, so there's no confusion about whether there are any missing transactions or inaccurate information. With Microsoft Dynamics, Quint has access to timely and accurate information on its operations, which improves decision making and helps management keep ahead of the competition."

- Rene Hagen, CEO, Quint Wellington Redwood

CONCLUSION

SMBs face the same challenges that larger organizations face: they must attract and retain talent, manage business operations and client relationships, deliver quality products and services, and ultimately, be profitable. Unfortunately, while they face the same challenges, they often have fewer resources – such as qualified IT staff – to help them meet their business objectives. However, changes in the enterprise application landscape in how applications are delivered, accessed, adopted, and integrated have put many more capabilities into the hands of SMBs. In looking at Microsoft Dynamics SMB customers, Nucleus found those that were the most successful worked with an experienced partner that understood their business and focused not just on process automation but on taking advantage of analytics and integration to drive greater visibility, more focused collaboration, and ultimately, better decision making. SMBs that don't take advantage of advances in cloud delivery, usability, mobile device access, and analytics are likely to struggle in the short term and find it difficult, if not impossible, to compete in the future.



WORK FORWARD.

Top Reasons to Purchase a Business Solution from Microsoft

Whether you are outgrowing entry-level accounting software, rubber-banding an outdated legacy solution, or simply tired of paying annual maintenance fees to a vendor that provides little to no value for your money—now is the time to give your people and your business the tools to work forward. Microsoft Dynamics ERP is an innovative, flexible solution that is fast to configure and deploy, easy to use, and provides forward-looking insights to help drive your business growth.

Here are the top reasons to purchase Microsoft Dynamics ERP for your small or midsize business:

It's More Than Just ERP

Microsoft has a complete vision for business applications, and it goes beyond what a simple stand-alone ERP solution or accounting software can do. It starts with a unique combination of business intelligence, collaboration, and communication tools embedded across your core business processes. The result—empowered people who make decisions that help increase your margins, improve your cash flow, and ultimately drive your business growth.

Helps Your People Work Better, Faster, and Smarter

Microsoft Dynamics RoleTailored user experience surfaces the information and tasks relevant to specific job functions. By putting the resources you need most right at your fingertips—and ensuring that the solution works seamlessly with the Microsoft productivity tools you already know how to use—training time is replaced with an intuitive experience that helps people work better, faster, and smarter right from the start.

"In our operation, the payback period for Microsoft Dynamics ERP with the RoleTailored interface was less than one year. The solution fits very closely to people's functions, which makes our work extremely efficient."

– Jan Hesselund, Billund Airport

Looks Forward, Not Backward

In today's competitive landscape you need more than a backward-looking system of record to compete. Microsoft Dynamics ERP helps you become proactive and predictive, with embedded business intelligence tools that help you not only solve problems but also prevent them from occurring in the first place.

"As the CEO, I love Microsoft Dynamics solutions because they present a wealth of extremely useful information in simple ways and much earlier in the business cycle. We can look at our business in new ways, easily identifying opportunities for top-line growth and bottom-line savings."

– C. Jeffery Wright, Urban Ministries Inc.

Gets You Up and Running in Days, Not Weeks

RapidStart implementation tools help make the solution fast and simple to deploy. And because the solution is easy to learn and use, you can be up and running quickly with less disruption to your business.

"The ability to have an ERP solution based in the cloud was critical for us, as it allowed us to deploy the software very quickly. And we were confident knowing that it was a proven product from Microsoft."

– Paul Mooty, Faribault Woolen Mill

Works the Way You Do

A Microsoft Dynamics ERP solution supports your *core* business needs with comprehensive built-in capabilities that are easy to customize. And you can be confident that our global ecosystem of partners—backed by the strength of Microsoft—have built a broad range of solutions that address specific industry needs.

Transforms the Way You Work and Connect

Transform the way your people do business with a solution that works the way they want to use it—over the web, through a SharePoint portal, or using a traditional desktop computer. With a business solution from Microsoft, both office and remote employees can perform business processes and connect through the tools and channels they're used to—such as instant messaging, email, voice, and presence.

Drives and Supports Your Business Growth

Microsoft Dynamics ERP supports and propels your business goals and overall growth. It easily accommodates new processes and additional lines of business, and it scales to meet higher demands, without sacrificing performance or incurring major increases to your original technology investment—or your payroll.

"Microsoft Dynamics ERP has played a critical role in our successful growth. With this solution, we can do business effectively with enterprises by offering resources and service levels that one would expect from a company much larger than ours. We quadrupled our business without adding people to the finance and IT departments."

– Ron Wollner, Computer Data Source

Provides a Flexible Deployment Model

You can choose the deployment model that makes the most sense for your business, whether on-premises, in the cloud, or a combination of both. Plus, you'll have the elasticity to adjust as your needs change.

Reduces Your Risk

Millions of users around the world already trust Microsoft to deliver innovative consumer and business solutions. In addition, our global partner network provides you with access to the local resources and expertise you need. And, when you purchase Microsoft Dynamics ERP, you can be assured of support for the version you buy for up to 10 years after its release.

Propels Your Business Forward

With a business solution from Microsoft, your people will have the innovative, flexible tools they need to be proactive and productive—keeping you ahead of the competition. As a result, your business can move forward instead of standing still.



WORK *FORWARD.*

ERP Deployment Scenarios: What's Right for My Business?

Are you a small or mid-sized business that is outgrowing your entry-level accounting software or thinking about replacing an outdated Enterprise Resource Planning (ERP) solution? If so, you have likely uncovered several factors to weigh before choosing what's right for your business. For starters, you'll want an ERP solution that delivers on your terms instead of requiring you to change **your** processes to fit its constraints. After all, if a solution limits your flexibility from the start, how can it **adapt** to meet your **future** needs? You need a solution that makes sense for your business and gives you the elasticity to adjust as your needs change.

The following guide provides an overview of deployment options to help evaluate the model that may best suit your business needs.

Deployment Scenarios: Defined

On-Premises

With the traditional on-premises deployment, ERP software is installed and run on dedicated servers in-house. Under this model, the company owns and services the hardware infrastructure and the installed ERP software licenses.

Off-Premises

Off-premises can include either a cloud-based or a partner-hosted deployment of the ERP solution. Cloud has quickly evolved into an IT industry buzzword, but companies need to recognize that there are significant differences in what each vendor offers as a cloud service.

Public Cloud

Under a public cloud, the ERP solution takes a web-hosting model in which the data and application resides in a remote server and can be accessed via an Internet browser or non-browser applications for your mobile or tablet devices. Public cloud offers a shared or multitenant infrastructure that may be virtualized and is owned by the vendor or the service provider. The customer typically rents the ERP software and infrastructure, and is charged on a pay-per-use or pay-per-user basis.

Private Cloud

A private cloud adopts the virtualized, self-service model of the public cloud; however, it typically does so within the company's firewall and is colocated at the company or vendor-hosted datacenter. The company either owns the ERP software and infrastructure, or vendors may provide an option for leasing this as a service. An important distinction from the public cloud model is that the service is provisioned exclusively for an organization (i.e., single tenancy) without any sharing of infrastructure among multiple customers.

Deployment Scenarios: Considerations

Before picking an ERP deployment option for your company, it is a good idea to evaluate the ROI achieved from each of the above scenarios.

This should be done from a long-term view that also accounts for user growth. Moreover, the chosen deployment option should make sense not just from a cost perspective,

but also from the perspective of achieving your business, security, compliance, technology, and operational or performance goals. Below are some of the criteria that you should examine:

- Do you prefer your ERP investment to be an up-front capital expense, as is applicable for an on-premises deployment, or an operating expense that is seen in a cloud-based subscription model?
- Do you possess a dedicated and knowledgeable IT staff to support an on-premises deployment, or do you prefer to offload the server and software management tasks to an external vendor?
- Does your business see heavy fluctuations or seasonality in ERP software usage?
- Are there any compliance requirements that restrict you from storing and managing data outside of corporate firewalls?

“The ability to have an ERP solution based in the cloud was critical for us, as it allowed us to deploy the software very quickly. And we were confident knowing that it was a proven product from Microsoft.”

– Paul Mooty, Faribault Woolen Mill

On-Premises

With an on-premises ERP deployment, the server infrastructure and software are owned by the company, reside within the organizational boundaries or firewall, and are handled by a dedicated internal IT team. This allows the company to maintain full control over the data and applications. Moreover, the system availability, uptime, security, and disaster recovery objectives are at the customer's control.

On-premises ERP deployment ensures that data compliance is effectively met for certain industries, such as in the

financial and healthcare industries, that have strict regulations on where the data is stored and managed.

Although deploying an on-premises ERP solution is typically associated with an up-front capital cost, over the long term and with user growth the solution can offer a lower TCO than a cloud-based subscription model. Companies should evaluate the reasons below and check whether this is true for their organization:

- There is usually a break-even point where the initial investment is paid off; however, with cloud, the subscription costs are recurring.
- Since cloud-based services are paid for as a utility (variable costs), the solution can prove to be less cost-effective as the organization continues to grow. With user growth, subscription costs can become higher than amortized capital expenses.
- With growth, network bandwidth costs can significantly affect company's budgets.

Public Cloud

Most public cloud vendors offer a preconfigured and self-service ERP solution that can be deployed quickly, giving SMBs desirable business agility. When a public cloud offering is designed for a specific type of business, such as professional services or process manufacturing, rapid deployment and minimal customization requirements can further accelerate deployment and time-to-value. Cloud solutions offer flexibility for a variety of end-point devices such as web clients, using a browser layer for presentation, mobile devices, or a specific program interface.

One of the big drivers toward cloud-based ERP is reducing the capital expenses incurred in purchasing hardware, software, and datacenter space related to an on-premises deployment. A predictable subscription fee of a cloud-based service gives companies control and visibility over their operating expenses, while lowering their start-up costs.

Another essential characteristic of a public cloud ERP solution is the solution's elasticity, which allows

infrastructure to be provisioned dynamically as business demand grows or shrinks. The pay-as-you-use model ensures that the customer does not over- or under-commit resources at its datacenter, as the infrastructure is now provisioned and released transparently by the cloud vendor. For example, the ability to add and subtract users as needed is useful for companies that have variable staffing, such as in retail or project-based companies.

Companies can reduce their IT overhead by minimizing the costs involved in building and training an internal IT support and development team. IT resources can then be focused on more strategic efforts, such as making use of new technology to drive business advantage over their competition. Also, companies need to worry less about deploying software and security updates, managing disaster recovery objectives, and carrying out other routine IT maintenance tasks. These activities are now managed by the cloud vendor, and system uptime is typically backed by a service level agreement (SLA). Moreover, moving the development and testing environments to an on-demand model allows for better resource utilization and faster deployment of changes, which can now be transferred simultaneously to all of the company's locations, with little deployment latency. These benefits free up company IT resources for other tasks that add value to the business.

Application Hosting

Many channel partners also provide a private application hosting model for ERP delivery and consumption. Similar to an on-premises deployment but instead of customers managing their own datacenter, the infrastructure and application management is entrusted to a channel partner that provides hosting services. This allows small and midsize businesses that typically lack dedicated IT staff to take advantage of the hosting partner's expertise and also cut down on their IT overhead.

While application hosting lacks the on-demand self-service model that is supported by a cloud, one should not discount the value that the customer gets from a hosted solution. With a hosted solution, the customer can achieve many of the virtualization, scalability, and outsourcing benefits

of a public cloud. Moreover, a single-tenancy model gives customers flexibility and control over customization, integration, upgrade cycle, and data, which is often not available with a multitenant hosting model.

"We felt that Microsoft Dynamics ERP hosted by our partner would be a great fit for our business because it required no capital outlay, which was perfect for an organization with very little time to implement a new ERP offering."

– Chip Pate, CompassLearning

Private Cloud

By hosting the ERP solution on dedicated servers within the company's firewalls, a private cloud solution achieves the inherent control, reliability, security, and compliance advantages of an on-premises ERP deployment. The application runs on a single-tenant platform that may include multiple consumers (e.g., different business units of the company).

With private clouds, the server and network infrastructure are designed for high reliability and performance. Multicore CPUs and high-bandwidth network infrastructure allow for virtualization, better resource pooling, and easy and incremental scaling—which is typically only seen in a public-cloud deployment. Virtualization further increases server utilization, lowers infrastructure and maintenance costs, and improves datacenter energy efficiency.

Provisioning the ERP application exclusively for a single customer also makes the integration and customization tasks easier compared with a multitenant hosting. Moreover, companies have an option to reduce their capital expenses by leasing the private cloud infrastructure from, and outsourcing the infrastructure management to, a cloud vendor.

ERP on Your Terms

Microsoft Dynamics ERP products offer multiple deployment and pricing options, including both on-premises solutions and cloud-based software-as-a service (SaaS) platforms provided by our global network of partners. Whatever your preference, you have the flexibility to choose the option that's right for you.

"After considering our options, we chose Microsoft Dynamics ERP over competing offerings for three reasons: superior technical flexibility, the partner ecosystem, and a long-term cost advantage."

– James O'Brien, Print Management Partners

With on-premises deployment, Microsoft Dynamics ERP software is hosted at your own location on your own servers or at a location of your choice. You can work with a partner to set up the necessary hardware and software, using new systems or available systems that you already own.

In addition to the traditional on-premises deployment, customers have the flexibility to choose either a hosted or SaaS/on-demand deployment. You can work with a global network of Microsoft Dynamics partners that have the industry and technical expertise to help you choose the ERP solution that's right for you.

Microsoft Dynamics ERP and its channel partners offer solutions on the customer's terms, helping to remove friction across your entire business while providing flexibility and choice—whether on-premises, hosted, cloud, or any combination of deployment—that best meets your needs. As a result, you can focus on what matters most to you—your business.

[Learn more about Microsoft Dynamics ERP for small and mid-sized businesses.](#)

[Learn more about Microsoft Dynamics ERP deployment options.](#)



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Customer: UMI

Customer Website:

www.urbanministries.com

Customer Size: 41 employees

Country or Region: United States

Industry: Publishing—Christian education curricula, vacation bible school, books, websites, and music

Customer Profile

The leading publisher for serving African-American churches and consumers, UMI (Urban Ministries Inc.) grows into new market segments while adjusting to drastic changes in how the industry produces and delivers content.

Software and Services

- Microsoft Dynamics
 - Microsoft Dynamics CRM
 - Microsoft Dynamics GP

For more information about other Microsoft customer successes, please visit: www.microsoft.com/casestudies

Publisher Adopts ERP and CRM Solutions to Enable Efficiencies and Drive Growth

"As we grow and build more customer relationships to deliver content around the globe, Microsoft Dynamics CRM and Microsoft Dynamics GP are the wheels on the engine of our progress."

C. Jeffrey Wright, CEO, UMI

Business Needs

Close to 55,000 African-American churches and millions of households take advantage of magazines, books, teaching curricula, digital media, and other content from [UMI \(Urban Ministries, Inc.\)](http://www.urbanministries.com). The company is the largest creator and publisher of resources and content for African-American churches and individual consumers. In addition, 15 denominational groups rely on UMI as their partner for custom publishing and media solutions.

C. Jeffrey Wright, the CEO of UMI, explains, "Our business is going through a revolution caused by new, breakthrough technologies and digital content delivery channels that find rapid adoption. At the same time, we also support another demographic that prefers print media. We were in need of a robust technology solution that would help us serve all of our consumers and institutional customers, track the relationships between millions of people and their churches, customize marketing and products for our audiences, and help our select business partners connect with the right market segments."

Neither UMI's legacy Exact Macola enterprise resource planning (ERP) system nor NetSuite had the flexibility to easily meet the company's requirements. Company leadership found it difficult to

extract timely, meaningful information from the systems. For example, Wright and his colleagues were not able to efficiently perform period-to-period comparisons of sales data and order volumes to use in business planning. Connecting churches, all of the individuals involved with a church, and their orders with as many as 40 different products also proved to be a challenging task, as was the management of subscriptions. Thousands of UMI customers receive publications at quarterly intervals, requiring the capability to generate correct orders with the proper inclusion of identical and different order detail.

Solution

When UMI researched software products and vendors, it found that almost all of the capabilities it looked for are standard in [Microsoft Dynamics](http://www.microsoft.com/dynamics). Deploying [Microsoft Dynamics GP](http://www.microsoft.com/dynamics/gp) and [Microsoft Dynamics CRM](http://www.microsoft.com/dynamics/crm) would give the company a solid infrastructure to manage the business and its complex customer relationships effectively. "We were a tough audience, examining technologies and vendors very thoroughly," says Wright. "Microsoft Dynamics solutions offered the most powerful tools, by far, to help us address our concerns."



UMI decided to implement Microsoft Dynamics CRM and Microsoft Dynamics GP. The company engaged with a Microsoft partner to perform the data migration and deployment. At UMI, 20 employees use Microsoft Dynamics GP and 8 people work with Microsoft Dynamics CRM. The two solutions integrate, so account, financial, and product information can travel both ways. Microsoft Dynamics GP integrates with an Azox e-commerce server and an Azox sales portal in use at the call center; UMI deployed both of these technologies in the cloud to ensure uninterrupted access for customers placing orders online or through the call center. Order detail from the e-commerce server and sales portal immediately flows into the Microsoft Dynamics GP solution. UMI also uses ExactTarget software in conjunction with Microsoft Dynamics CRM to manage marketing initiatives.

By using Microsoft Dynamics GP, UMI managers can report directly on orders, order types, and product availability per month, quarter, or year, eliminating the error-prone and work-intensive steps of exporting the information from the ERP system, manipulating it, and reimporting it. During the implementation, the technology partner also configured Microsoft Dynamics GP to automatically allocate inventory to back orders and create batches of orders for the fulfillment department to pull and ship. In addition, UMI implemented credit card-processing software to streamline sales order processing.

Benefits

As UMI finds, Microsoft Dynamics shows great range in supporting the way the company and its people work. "When employees learn more about the solutions and have requests for more advanced usage scenarios, we can almost always satisfy their needs and create new, streamlined processes based on our ability to obtain information we were not able to get

before," says Wright. "As we grow and build more customer relationships to deliver content around the globe, Microsoft Dynamics CRM and Microsoft Dynamics GP are the wheels on the engine of our progress."

Meet Customer Needs with Optimal Economy

UMI generates remarkable efficiencies and savings by using Microsoft Dynamics. For example, order processing that used to take days to review before the organization could ship the orders now completes within a matter of minutes. Comparable efficiency gains affect invoicing and cash receipt processing. "We are saving thousands of hours a years in our accounting and financial management alone," Wright comments. "At the end of the month, we close business in days instead of weeks. We introduced automated billing and invoicing, saving time and eliminating the errors that can happen with repeated, manual data entry."

The company also saves shipping and production costs. "Because we can easily group orders by size, type, and other criteria, we can ship more efficiently and produce substantial savings in shipping and handling charges," explains Wright. "And now, because it takes minutes instead of weeks to generate orders, we can schedule the printing and production of curricula and subscription orders very close to the shipping schedule, which helps us manage and control operational costs."

Consumers benefit as well. "Our customers who order curricula very much appreciate receiving their products with enough time to prepare their classes, and our subscription orders get out much earlier than they used to," says Wright. "With Microsoft Dynamics GP, we are managing order fulfillment and shipping more effectively than any time in our more than 40 years of business history."

Increase Profitability with Proactive Applications

Wright and the UMI leadership team rely on information from Microsoft Dynamics GP and Microsoft Dynamics CRM to understand business trends and direct the company. "As the CEO, I love Microsoft Dynamics solutions because they present a wealth of extremely useful information in simple ways and much earlier in the business cycle than I'm used to having it," says Wright. "We can look at our business in new ways, easily identifying opportunities for topline growth and bottom-line savings. Our industry is in a revolution, and it is critically important that we be able to take advantage of changes in the environment to remain effective and profitable. Today, I see results faster and am more confident in making decisions based on meaningful data than ever before."

Present Greater Value to Business Partners

As a leading content provider with a high level of trust and direct access to the large African-American community, UMI occasionally partners with other publishers and media companies that want to reach African-American audiences. These companies may only be interested in a segment of the audience. "We have unlocked the power of a very valuable consumer," notes Wright. "What's more, we are in a unique position of trust with our audiences. In helping our partners connect with African-American audiences, Microsoft Dynamics CRM and Microsoft Dynamics GP are invaluable in tracking consumer behaviors and spending. The technologies assist us and our partners in successfully engaging in this market and exposing consumers to new content of interest to them."

Grow in New Geographies and Market Segments

In the coming years, UMI is going to invest a lot of effort in growing the consumer side of the business while maintaining its services to churches and businesses. The company is also going to pursue more growth in markets outside of the United States and offer more content designed for smartphones and other screens, in addition to traditional print media. "We now have the tools to capture detailed customer information when consumers connect with us through our website and call center so that we can give personalized attention," says Wright. "Our investment in Microsoft Dynamics is preparing us to become a dominant player in our industry."



Tailor-made solution for Harley Davidson dealership increases customer satisfaction

Overview

Country or Region: Czech Republic

Industry: Motor Vehicle and Motorcycle Parts Dealer

Customer Profile

The company, Klasik Moto a. s., ranks among the top Harley-Davidson dealerships in Central and Eastern Europe and is one of the few dealerships that provide a complete portfolio of H-D services.

Business Situation

The company had been looking for a new information system capable of covering all their internal processes and specific needs as well as increasing customer satisfaction.

Solution

The dealership directors decided to implement Microsoft Dynamics NAV with a business solution ABS H-D from AXIOM PROVIS Int. that was tailored to the company's specific needs.

Benefits

- Thorough coverage of all dealership processes
- Discount expenditures lowered by 50%
- Budget preparation efficiency up by 100%
- 40% of person-hours saved on data collation
- Interconnectedness with the H-D Snap-On system for ordering parts

"When shopping with us turns into an experience, then the customer will return."

Jaroslav Vavřina, Co-owner and Manager, KLASIK MOTO, a. s.

The Harley-Davidson (H-D) motorcycle dealership, managed and operated by the company Klasik Moto a. s., ranks among the top dealerships of this brand in Central and Eastern Europe. It is one of the few dealerships that provide comprehensive business services that are available to H-D dealers - new and used motorcycle sales, parts, apparel, accessories, bike rentals and express lane and standard servicing. The Microsoft Dynamics NAV system best fulfilled the highly demanding requirements of such complex processes. It was co-created with a partner solution, ABS H-D, and tailored to fit the needs of H-D dealers.



"The secret behind our dynamic business is the fact that we do things with our hearts."

Jaroslav Vavřina, Co-owner and Manager, KLASIK MOTO, a. s.



Situation

"At Harley-Davidson we all hold very similar guys, salesmen or even our receptionists. We're not just selling pieces of metal. In our dealership we do and live by what we believe. We love riding, freedom and fun. We enjoy being with our friends. We are aware that we only live once, so we want to make the best of it. The secret behind our dynamic business is the fact that we do things with our hearts," explains Jaroslav Vavřina, Co-owner and Manager of Prague's Harley Davidson dealership, Klasik Moto a. s., and he adds: "That is the reason why we only want service suppliers who understand this philosophy and are willing to walk the line with us. The same applies when we are looking for an IT supplier or any other service that we are buying."

"Harley-Davidson is an emotional brand. Therefore the quality of the relationship, formed when buying a product that carries our logo, is just as important as the beautiful design, the astounding power or the unique sound of our motorcycles," says Jaroslav Vavřina.

Surprisingly, the relationship doesn't usually start with a motorcycle purchase. For example, the story of a long-term customer can sometimes begin at a festival stand merely by obtaining an H-D t-shirt. This qualifies them to receive the H-D Prague bonus card and to become a member of the Harley-Davidson community. Along with the card, they receive an invitation to experience a ride – one that is impossible to forget.

"When a customer decides to buy their dream machine, he/she enters a fascinating world where they can fulfill all their dreams: completely unleash themselves, meet new friends and enjoy newfound freedom. The sort of freedom that they hadn't known until that moment", says Jaroslav Vavřina.

Harley-Davidson's commitment to meeting customer expectations means that everything that happens within the company must be a part of a system that is built around customer needs and not solely for the company's internal organizational needs. "H-D Prague provides a full spectrum of services. We do everything imaginable, when it comes to motorcycles: new and used motorcycle sales, servicing, tuning, apparel and accessories sales and bike rentals. We also run the club restaurant and bar, organize many events and support the local Harley Owners Group (HOG). This is quite a large spectrum of activities to manage and keep perfectly organized," explains H-D head of sales and co-owner, Vojta Vavřina.

"We are a very exacting business and we have a clear vision of our needs. We know what we want to do for our customers and how to achieve it. We have always gathered data on our customers, but now we would like to launch a system that will help us run these processes in a much more sophisticated way," emphasizes Jaroslav Vavřina. And that is exactly how the contract specifications were defined in the tender for IT services.

Solution

The requirements for the IT solution were very complex. Our goal was to cover all of our internal processes: from ordering spare parts to monitoring the productivity of our service employees on to motorcycle sales and apparel and accessories sales. Of course it included the coordination of social and special marketing events. This is how Jaroslav Vavřina describes the process: "Every contact with a customer must be recorded in our system. When a customer calls, we immediately want to know what bike he rides, what type of clothing he likes, his size, and what events he likes to attend.



"For the H-D Prague tender we offered our own vertical solution, ABS DMS, adapted for auto dealers and built on the Microsoft Dynamics NAV platform."

Petr Franěk, Sales Manager,
AXIOM PROVIS Int.



That is the only way to know who we are dealing with, what his/her needs are and how we can help fulfill them. We do not want to bother our customers by offering them things in which they are not interested."

These highly-demanding requirements were best met through the system offered by Microsoft Dynamics NAV, specifically in a customized version from Microsoft partner, AXIOM PROVIS Int. "For the H-D Prague tender we offered our own system adapted for ABS DMS auto dealers built on the Microsoft Dynamics NAV platform. To meet their challenging requirements, we had to develop further components and make alterations; namely bonus cards with barcodes and a module for sending text messages," explains Petr Franěk, sales manager for AXIOM PROVIS Int., describing their successful solution.

The software provided by Microsoft Dynamics NAV 2009 R2 with ABS H-D solution and Microsoft Dynamics CRM 2011 operates on Microsoft Windows Server 2008 R2 using a Microsoft SQL Server 2008 R2 database. AXIOM PROVIS Int. is also in charge of running this server.

The bonus cards with barcodes correspond, on the customer side of things, with the concept of monitoring "customer activity". With each purchase of a product or a service, reward points are added to the bonus card. The customer can later spend these on any item in our full assortment of products and services.

Benefits

Within the newly-implemented system we work with several thousands of customers and 8 company cost centers with 15 employees in total. They all use the system every day at work. All the operations within the system are done using Microsoft

Windows and Microsoft Outlook, which the employees were using before the new system implementation. This enabled them to master the new system environment immediately after start up. A new component that H-D Prague wishes to alter will soon appear in the same environment and its use will again be facilitated by employee familiarity with the system.

The system covers the complete agenda of dealership business operations – 8 cost centers, 7 specialized modules within the framework of ABD H-D and dozens of specific H-D functionalities, reports and analyses. All of the data are linked and provide for quick orientation and their quick analysis as well as for easy decision-making.

Since we started using Microsoft Dynamics NAV and the ABS H-D budgeting tools, both monthly and annual budget preparation efficiency has increased by 100 percent. Moreover, the accuracy of the process has improved due to Microsoft Business Intelligence analytical tools.

For most of our key employees, weekly and monthly reports are an indispensable part of their work routine. Microsoft Business Intelligence with ABS H-D analysis and reporting capabilities has enabled the extraction of much desired, real-time information on sales and purchases, service department efficiency, financial reports and analyses. Together Microsoft Business Intelligence reporting and analytical tools helped us reduce the number of person-hours spent performing these tasks by 40 percent. "Reports used to be tedious. We would spend days on data collation. Now it's all available at a click of a button," comments Jaroslav Vavřina.

Monitoring of service effectiveness is linked to the system for rewarding technicians.



“Every contact with a customer must be recorded in our system. We do not want to bother our customers by offering them things in which they are not interested.”

Jaroslav Vavřina, Co-owner and Manager, KLASIK MOTO, a. s.



This prevents customers from being overcharged for work done on their motorcycles and, at the same time, it rewards technicians for quick, top quality service.

Thanks to the ABS H-D bonus system, which covers all dealership areas and includes shop, service and new motorcycle sales, we spent 50 percent less on discounts awarded customers, while maintaining the same level of customer satisfaction.

Furthermore, the system offers a great benefit within the service module, which leads to improved effectiveness. It is based on interconnectedness with an online spare parts catalogue, Snap-on. It operates online, so the technician handling the order can easily and quickly post an entry for the selected spare parts using the service order form. This interconnectedness leads to lower numbers of errors and the overall acceleration of entering spare parts orders into the online forms.

Future:

At H-D Prague the idea of driving customer satisfaction is based on clever and sophisticated use of CRM strategies. These systems, brought back to life in 2011, are a necessity. However, for any CRM to be meaningful, it has to utilize reliable data, which H-D Prague now does using Microsoft Dynamics NAV. “We believe that in 2012, after installing the CRM module and boosting all of its systems, we will fulfill our goals. We will be capable of providing customers information that interests them, i.e. about events they like, apparel and accessories that match their taste and fit in their collections,” comments Jaroslav Vavřina.

A logical step forward in perfecting our customer care will be the

interconnectedness of our system with our e-shop and monitoring customers' bonus card status and history. The H-D owners expect IT system enhancements to culminate in the use of Business Intelligence tools: ones that use a Microsoft SQL Server subordinate to Microsoft Dynamics NAV and Microsoft Dynamics CRM and which allow for complex and specific inspection of a company's operations. It is a tool that will give every user (employee/manager/technician) a chance to keep track of the company's activities from a perspective that is relevant to his/her job. Service technicians will be able to see the progress in their effectiveness, sales people will be able to follow sales stats for each product segment and event organizers will gain a better understanding of who likes what events, etc.

A mutual sharing of already-developed functionalities will take place within the framework of implementing and distributing ABS H-D to other dealers of the brand. This should consequently lead to considerable cost reduction for the whole system and also for newly-developed functionalities. Since the ABS H-D evolved from the field-proven ABS DMS solution, there are also other benefits for H-D dealers. For example, they can use system upgrades originally developed for car dealers - that is assuming that the functionality for both the cars and motorcycles has the same functional principles.

For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers in the United States and Canada who are deaf or hearing impaired can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to www.microsoft.com

For more information about AXIOM PROVIS Int. products and services visit their website <http://www.axiomprovis.cz>

For more information about KLASIK MOTO, a. s. products and services visit their website <http://www.harley-davidson-praha.cz/>

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your team to make business decisions with greater confidence. Microsoft Dynamics works similar to familiar Microsoft software, such as Microsoft Office, which means less of a learning curve for your team, so they can quickly get processes up and running and focus on what's most important. And because it is from Microsoft, it works easily with the systems that your company has already implemented. By automating and streamlining financial, customer relationship and supply chain processes, Microsoft Dynamics brings together people, processes and technologies; increasing the productivity and effectiveness of your business and helping you drive business success.

For more information about Microsoft Dynamics, go to www.microsoft.com/dynamics

Software and Services

- Microsoft Dynamics
 - Microsoft Dynamics NAV 2009 R2
 - Microsoft Dynamics CRM 2011
- Microsoft Server Product Portfolio
 - Microsoft SQL Server 2008 R2
 - Microsoft Windows Server 2008 R2

Partners

- AXIOM PROVIS Int.

Microsoft Dynamics Customer Solution Case Study



Performing-Arts Center Moves to the Cloud to Streamline Finance and Focus on Its Goals

"By using cloud-based Microsoft technologies, including Microsoft Dynamics GP, we generate substantial savings and efficiencies; practice transparent, sound financial management; and bring outstanding performing-arts events to growing numbers of patrons."

Connie Silverman, Controller, Kauffman Center for the Performing Arts

Customer: Kauffman Center for the Performing Arts

Customer Website:

www.kauffmancenter.org

Customer Size: 30 employees

Country or Region: United States

Industry: Nonprofit organizations; Retail—Performing arts and spectator sports

Partner: NetStandard

Partner Website: www.netstandard.com

Customer Profile

In its spectacular new building, the Kauffman Center for the Performing Arts in Kansas City delivers extraordinary performing-arts experiences to the community, aiming to do so with optimal efficiency and financial accountability.

Software and Services

- Microsoft Dynamics
 - Microsoft Dynamics GP
 - Microsoft Dynamics Retail Management System
- Microsoft Office
 - Microsoft Outlook
- Microsoft Server Product Portfolio
 - Microsoft Exchange Server
 - Microsoft SharePoint Server

For more information about other Microsoft customer successes, please visit: www.microsoft.com/casestudies

Business Needs

The [Kauffman Center for the Performing Arts](http://www.kauffmancenter.org) in Kansas City, Missouri, which opened its doors to the public in October 2011, aims to enrich the lives of communities by offering extraordinary performing-arts experiences. The Kauffman Center's new building quickly became iconic to its city and region and received praise for its dramatic, compelling design; excellent acoustics; and complete accessibility. A lean organization, consisting of 30 employees, manages the Kauffman Center's business operations, focusing on the core mission of facilitating performances. The Kauffman Center outsources such functions as ticket sales, food and beverage sales, janitorial services, and IT to qualified vendors.

For several years before the opening of the new facility, the Kauffman Center ran as a start-up with a small staff. For accounting, a hosted instance of Intuit QuickBooks provided appropriate functionality. However, as opening day approached, the business was about to become more complex. Connie Silverman, who as the Controller at the Kauffman Center is also responsible for human resources and IT, explains, "We wanted to be ready with a robust financial management solution that would let us record and manage revenue, perform proper depreciations, manage fixed assets, and work effectively within a complex fund-accounting structure. We also needed the reporting capabilities to ensure our compliance, in terms of proper payment of taxes, grant management,

bond financing, providing informational returns, and general transparency of our financial practices."

Accessing the new financial management solution in the cloud continued to make best sense for the Kauffman Center's business model. Silverman and her colleagues reviewed possible solutions to replace their current financial software.

Solution

The Kauffman Center connected with Microsoft partner [NetStandard](http://www.netstandard.com) and found a good match in a technology provider that was able to share the organization's goals and become a trusted partner in its outsourced business model. A hosted NetStandard solution called [MyAppsAnywhere](http://www.netstandard.com) offered almost all of the software functionality the Kauffman Center needed. In an incremental approach, the Kauffman Center started with Microsoft Exchange Server and added the other tools over time. In the case of Microsoft Dynamics GP, the Kauffman Center went live with the new software 18 months before the new facility opened, giving technology users ample time to test the solution in real-life business scenarios.

With the complete MyAppsAnywhere deployment, the Kauffman Center gained many important business-enabling capabilities:

- [Microsoft Dynamics GP](http://www.microsoft.com/dynamics/gp), an enterprise resource planning (ERP) system, that the



Kauffman Center relies on for financial management functionality

- [Microsoft SharePoint Server](#) for file and content sharing, including announcements, policies and procedures, and the calendar of activities
- [Microsoft Exchange Server](#) and [Microsoft Outlook](#) for email communications and collaboration

Kauffman Center employees access the hosted solutions securely and from any location through their web browsers, without needing to go through a virtual private network. They can choose the devices that they prefer to access the solutions on, including tablet or laptop computers and smartphones.

By integrating Microsoft Dynamics GP with [Microsoft Dynamics Retail Management System](#), a point-of-sale system, the Kauffman Center can record payments for retail, catering, and concession sales by using handheld devices. The integrated system also connects to Tessitura Software, a specialized solution for customer relationship management, ticketing, and other business tasks in arts organizations. Financial detail from both Microsoft Dynamics Retail Management System and Tessitura Software resides in the database in Microsoft Dynamics GP, where it is available for financial processing and reporting. The implementation of Microsoft Dynamics GP complies with Generally Accepted Accounting Principles (GAAP).

The Kauffman Center continues to work with NetStandard on technology-related projects. Currently, the technology partner is working on closer integration of the solution's components, consistent purchasing workflows, and more advanced reporting from Microsoft Dynamics GP.

Benefits

With key business systems in the cloud, the Kauffman Center team can focus on its most important tasks. "Microsoft Dynamics GP and our other hosted Microsoft technologies are strong enablers of our business model," says Jane Chu, CEO of the Kauffman Center. "They help us effectively serve our patrons and the community, bringing more than 200 events to over 340,000 visitors throughout the year and providing them with a powerful performing-arts experience."

Save \$600,000 in Three Years

By moving key business applications to the cloud and entrusting IT support to an expert team, the Kauffman Center generated enormous savings. Comparing the costs of owning and operating cloud-based solutions to that of implementing and supporting the software on-premises over a span of three years, the organization saved a little more than US\$600,000. "We perform annual reviews of the costs and benefits of the technologies we use," Silverman comments. "We might not always save as much as we do in our first three years, but Microsoft Dynamics GP and the other technologies in the cloud will continue to be financially advantageous. For one thing, we will never need to hire administrative and help-desk professionals to support our business infrastructure. Instead, we contract with accomplished experts who do this work for us with outstanding quality and optimal economy."

Simplify Financial Management

The Kauffman Center achieved noticeable efficiency gains in its finance management. "With Microsoft Dynamics GP, it takes a few minutes to run all the profit-and-loss and other financial reports and produce financial statements at the end of the month," says Silverman. "Those tasks used to take a week-and-a-half."

The organization replaced many manual reporting tasks, performed in spreadsheets, with automated reporting that provides executives, auditors, and others with the information they need to see. The Kauffman Center's finance team also takes advantage of Microsoft Dynamics GP to perform such tasks as managing fixed assets efficiently. "Fixed-asset management is helping us quite a bit," notes Silverman. "Adding individual or bulk assets as groups or classes is a very straightforward task." She also has noticed a change in her own work. "With Microsoft Dynamics GP, I am more productive; I can quickly review accounts-receivable and accounts-payable entries in batches, instead of looking at each single entry," she remarks.

Provide Transparency with Complete Data Integrity

Beyond controlling the organization's finances, the Kauffman Center relies on Microsoft Dynamics GP to comply with the reporting needs associated with grants, taxes, bond

financing, audits, and informational requests. Sharing sensitive information within the organization and with outside agencies also imposes stringent requirements for data integrity. Silverman comments, "By using Microsoft Dynamics GP, we have all the insight and reporting tools that we need to work effectively with outside organizations and give them insight into our financial status. We've also streamlined the effort of producing monthly, quarterly, and annual reports. What's more, the security features of our hosted Microsoft technologies are fantastic. We can easily set the proper controls so that only authorized persons can change certain records and confidential patron or donor information, such as credit card numbers, is safe from unwarranted viewing."

Set Directions for the Future

In other projects, the Kauffman Center is working on implementing automated, consistent workflows for the origination, authorization, and management of purchase orders, automated budget reports, and executive dashboards with real-time financial information for executives. "We have already accomplished much and will continue to expand our use of Microsoft technologies," states Silverman. "I'm looking forward to taking financial management to the next level and meeting our next challenges while we bring more performances to a growing community of patrons."

A sustainability initiative underway at the Kauffman Center also benefits strongly from Microsoft Dynamics GP and hosted technologies. "By using Microsoft Dynamics GP, we can largely eliminate paper-based processes and documentation, which makes better environmental sense in addition to being more efficient," says Silverman. "For example, we are moving to completely electronic vendor management, including electronic invoicing. The cloud-based technology deployment also helps us avoid the environmental impact of having all servers and networking equipment onsite."



WORK FORWARD.



Billund Airport – West Denmark direct

Customer: Billund Airport

Customer Website:

www.billund-airport.com

Customer Size: 800 employees

Country or Region: Denmark

Industry: Transportation and logistics—
Transportation—Air transportation
services; Retail

Partner: Logica

Partner Website: www.logica.de

Customer Profile

Billund Airport is an international airport in West Denmark. The airport has 800 employees and serves more than 2.5 million travelers per year.

Software and Services

- Microsoft Dynamics
 - Microsoft Dynamics NAV
- Certified for Microsoft Dynamics Solutions
 - LS Retail NAV



You can read more about LS Retail that Billund Airport chose in the [Microsoft Dynamics Marketplace](#).

For more information about other Microsoft customer successes, please visit: www.microsoft.com/casestudies

Major Airport Combines Financial and Retail Management, Empowers Employee Productivity

“In our shopping operation, the payback period for Microsoft Dynamics NAV with the RoleTailored interface and LS Retail was less than one year. The solution fits very closely to people’s functions, which makes our work extremely efficient.”

Jan Hessellund, Retail Manager, Billund Airport

Business Needs

[Billund Airport](#) is the second-largest airport in Denmark, with 800 employees and serving more than 2.5 million travelers each year. Most flights from Billund Airport go to destinations within Europe, the Middle East, and North Africa.

In light of the economic downturn and dramatic changes in the airline industry, Billund Airport has maintained a strong focus on running an efficient, cost-effective operation, including the airport’s retail business. Jan Hessellund, Retail Manager for Billund Airport, explains, “Whereas, in the past, we would earn our revenue largely from the number of flights and passengers we could attract to our airport, we now earn a large part of our revenue from retail, parking, and cargo. Of those three categories, retail, which includes our food and beverage services as well as shops, has been extremely critical.”

To achieve better control of its retail costs, Billund Airport made the strategic decision in 2008 to change its shop operations partner. The airport’s new shops partner used an SAP enterprise resource planning

(ERP) system for financial management. To connect to this system and share key sales information, Billund Airport understood it would need to switch from its basic accounting solution, Limes, to a more sophisticated financial management package.

At the same time, the switch to a new financial management solution opened up the opportunity for the Billund Airport to switch from its retail management system, Oscar, to a more richly featured and efficient, integrated solution. Says Hessellund, “Our financial and retail management systems weren’t integrated, so we lacked comprehensive insight into our sales. We also didn’t have a way to correlate individual passengers and flights to the types of purchases they made, a capability that would enable us to better stock our shelves to drive revenue.”

Solution

Following the suggestion of its shopping partner and after reviewing a number of possible solutions, Billund Airport decided to implement [Microsoft Dynamics NAV](#), a full-featured ERP system with wide



adoption in Europe and across the globe, as its new financial management solution. To perform the efficient deployment of the solution, Billund Airport engaged its local Microsoft partner, [Logica](#). Says Hessellund, "Not only would Microsoft Dynamics NAV ease integration with our shopping partner's ERP system, but it was also already well known to many of our accounting team members and was a well-proven solution in Denmark, making it a great fit for our business."

In addition, Billund Airport found the prospect of extending Microsoft Dynamics NAV with the fully integrated retail management solution [LS Retail NAV](#) particularly appealing. Says Hessellund, "With Microsoft Dynamics NAV extended with retail functionality, we could have a single solution that met all our needs, both from a financial management and retail management perspective."

Currently, eight employees in the airport's financial team work with Microsoft Dynamics NAV every day. These employees use the solution for its general ledger, accounts payable, and accounts receivable functionality. For them, the Microsoft Dynamics RoleTailored user interface is critical. As Hessellund explains, "We appreciate that the RoleTailored interface removes all unnecessary information and functions and lets employees focus on the tasks and data they really need to work effectively." In addition, in an upcoming project, Billund Airport plans to configure Microsoft Dynamics NAV to provide an automated invoicing workflow between Microsoft Dynamics NAV and the shopping partner's SAP system.

Airport employees also make extensive use of the integrated Microsoft Dynamics NAV and retail solution and business infrastructure both in the back office and at the point of sale. Airport workers already use the point-of-sale solution for Microsoft Dynamics NAV in the airport's shopping outlets and are beginning to use it for the airport's food and beverage services. A

customization to the solution also enables retail workers to scan a customer's ticket and associate it to a flight to facilitate better planning of retail offerings in response to actual demand.

"We have dramatically improved our insight into the categories and individual products that we sell to each flight and passenger, and now we can optimize our storefront accordingly," says Hessellund. "What's more, when we know we're going to have a large number of international flights in the next few days, we can optimize our shelves to put popular duty-free items, such as spirits and tobacco, front and center."

Benefits

With Microsoft Dynamics NAV implemented and taking advantage of the RoleTailored interface, Billund Airport has improved business insight, achieved a less than one-year payback in its shopping operation alone, and has seen an increase in shopping revenue of 10 percent since going live with the solution in 2008.

Improve Business Insight

With its new ERP and retail management system tying together all financial and retail information with passengers and flights, the Billund Airport enjoys a comprehensive view and ability to take control of the retail business. Says Hessellund, "With Microsoft Dynamics NAV, we have all our information in a single database and can quickly view it and analyze it further in Microsoft Excel. We can see exactly where we are profitable and where we need to change our approach so that we can sell the right products to the right flights and passengers and increase our revenue."

Improve Shopping Revenue 10 Percent

Drawing on its comprehensive business database within the ERP system, the Billund Airport has succeeded in improving its revenue by optimizing its shopping operation and the products available to travelers. Says Hessellund, "In recent years,

many more travelers have come through Billund airport, increasing our absolute retail results. However, if you compare retail revenues for the same numbers of flights and passengers today to what they were three years ago, it becomes clear that we achieved a revenue increase of 10 percent by using Microsoft Dynamics NAV."

Rapid Payback by Using the Capabilities of the RoleTailored Interface

By increasing retail sales 10 percent and making employees more productive with the solution's RoleTailored interface, Billund Airport has generated a markedly rapid return-on-investment. Says Hessellund, "In our shopping operation, the payback period for Microsoft Dynamics NAV with the RoleTailored interface was less than one year. The solution fits very closely to people's functions, which makes our work extremely efficient."

The RoleTailored interface plays a crucial role in Billund Airport's successful ERP experience. "Microsoft Dynamics NAV with the RoleTailored interface makes a noticeable difference in our lives," says Hessellund. "The solution presents so many opportunities to work effectively. Employees can use graphics and data displayed in the RoleTailored interface to quickly review key facts and decide if they need to dive deeper. The relevant visual overview, together with easy individual adjustment depending on an employee's requirements, helps us work smarter and with greater impact."

The RoleTailored interface integrates with Microsoft Outlook, so employees can remain within the ERP system to create or view email messages, meetings, and tasks without distraction. An interactive, responsive search engine helps extend individual roles with additional information. Says Hessellund, "The search function in the RoleTailored interface within Microsoft Dynamics NAV is very powerful and saves us lots of time."