Case Study

# Press Ganey: Gaining Success with Microsoft Dynamics and Velosio

## The Challenge

The organization was experiencing tremendous growth in several of their lines of business. Their growth, coupled with a changing business model, stretched the organization's use of systems to the breaking point. The disparate, largely disintegrated systems used for Customer Relationship Management, Customer Data and accounting created inefficient, redundant operations to perform basic tasks.

Press Ganey was at a point where they needed speed and agility to keep up with client demand. Their legacy systems did not accommodate this, and were not compliant with best accounting practices. Simple tasks, such as month-end reporting, took more than a week to complete. In order to complete reports, they were required to export data from their homegrown system and then import the data to their accounting system.

In addition to time-consuming steps required to complete common tasks, Press Ganey found that management information was not only untimely, but increasingly inaccurate.

## About Press Ganey

Recognized as a leader in performance improvement for more than 25 years, Press Ganey partners with more than 10,000 health care organizations worldwide to create and sustain high performing organizations, and ultimately improve the overall health care experience. The company offers a comprehensive portfolio of solutions to help clients operate efficiently, improve quality, increase market share and optimize reimbursement. Press Ganey works with clients from across the continuum of care — hospitals, medical practices, home care agencies and other providers — including 50% of all U.S. hospitals. For more information, visit **www.pressganey.com.**

## The Solution

The organization decided to select and implement a fully-integrated Enterprise Resource Planning (ERP)/Enterprise Project Management (EPM) system. After an extensive evaluation process, they selected Microsoft Dynamics. There were several factors which the company weighed in its decision to implement Dynamics, but principally it was the application's highly integrated nature. The new system also needed to streamline common tasks such as financial and management consulting, and Dynamics fit the bill.

Microsoft Dynamics would need to not only provide timely information, it would need to eliminate the "silos of information" created by their disparate legacy systems. The tightly integrated nature of the Dynamics solution would allow various departments within the organization to see the status of projects in real-time. The implementation  also included key integrations with Dynamics CRM and Big Machines, a leading Configure Price Quote (CPQ) provider.

The CRM integration streamlined and enhanced the customer service experience while the Big Machines integration avoided duplicate entry of contract data in two separate systems. Contract definition was done in Big Machines and automatically transferred data to the ERP for the accounting and financial set up.

## The Results

Press Ganey realized immediate results upon implementing a new ERP. Common reporting functions that took a week or more to complete in their old system took less than 2 days. Invoicing clients went from a multi-day to a single day task.

Management gained valuable insights. "In the past IT supported management with the generation of reports and custom queries; with the new system, end users could generate their own reports and even create them using the wizard-driven menus," states Lin Jimison, Senior Business Analyst with Press Ganey.

In addition, providing sales reps with better visibility of projects and resources allowed Press Ganey to decrease its sales cycles and provide more accurate quotes to clients and prospects.

## Working with Velosio

Press Ganey evaluated a wide array of companies before ultimately selecting Velosio to assist with the implementation. The decision to select Velosio was driven by a variety of factors; among the most significant was knowledge of the Professional Services industry.

"We spoke with a number of partners, but ultimately none of them knew our industry requirements like Velosio," stated Jimison.

"We were impressed by the incredible depth of knowledge of the people we spoke with from Velosio. We're extremely pleased with the relationship we have with Velosio. They take the time to understand our requirements. They continue to provide us with guidance on better, smarter and faster ways to do things."

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