



CLIENT SOLUTION CASE STUDY

Berkowitz Pollack Brant Supports Growth with Microsoft Dynamics 365

DEPLOYED ON TIME
AND UNDER BUDGET

Customer: Berkowitz Pollack Brant Advisors + CPAs

Industry: Professional Services, Accounting

Headquarters: Miami, FL

System: Microsoft Dynamics 365 for Finance and Operations

CHALLENGE: Berkowitz Pollack Brant was outgrowing QuickBooks for financial management and encountered an inefficient process reconciling the systems each month.

SOLUTION: Berkowitz Pollack Brant selected Microsoft Dynamics 365 for Finance and Operations to gain better financial control and to provide a 360-degree view of its client relationships.

BENEFITS:

- Decreased time for month-end close by over 80%
- Increased efficiency allows staff to spend time on value-added analysis
- Provided one version of the truth for improved decision making
- Addressed variances in time and expense in a proactive manner
- Connected Dynamics 365 to other applications and systems
- Reduced errors from manual and double entry

CLIENT OVERVIEW



Established in 1980, Berkowitz Pollack Brant (BPB) is an independent accounting and advisory firm with offices in Miami, Ft. Lauderdale, Boca Raton, West Palm Beach and New York City. With nearly 300 accountants, tax specialists and consultants, BPB is one of the largest accounting firms in south Florida and one of the top 100 firms in the United States.

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A Growth Plan

BPB, a rapidly growing CPA firm, outgrew QuickBooks and was bumping up against limitations in the system for revenue recognition, sales analysis and real-time project accounting. “QuickBooks had significant limitations for us,” says BPB CFO Andres “Andy” Advincula. “We made the decision to replace it with a cloud-based, all-encompassing ERP solution which would include accounting, HR and payroll, time and billing, CRM, and more, instead of a bolted-on solution.”

BPB released an RFP to Microsoft Dynamics 365 for Finance and Operations, NetSuite and Sage to compare all three solutions. “I had past experience with Microsoft Dynamics NAV, but we had all three vendors come in to present in order to cover all of the bases,” explains Advincula. “In the end, we selected Microsoft Dynamics 365 for Finance and Operations because we see it as a true ERP system which would provide us with one version of the truth across departments, and it seemed very easy to use since our team is already familiar with Microsoft navigation from using Microsoft Office 365,” says Advincula.

Velosio Advantage

BPB selected Velosio as its implementation partner because of the team’s experience with Dynamics 365. “Velosio had the most experience of all the other partners, and they gave the best presentation that we saw,” says Advincula. “They were very responsive, answered all of our questions, made sure to check off all of our wants and needs, and were specific and diligent with the implementation information.”

Velosio’s AXIO-enabled implementations are fundamentally different than traditional ERP projects because they start with a functioning financial system and leverage agile development principles to rapidly tailor a solution. Building on the automation capabilities of Microsoft Lifecycle Services (LCS), AXIO streamlines and accelerates implementation and management of Dynamics 365 for Finance and Operations and can reduce total cost of ownership by 50% or more. And that’s just what AXIO delivered for BPB. “Velosio implemented Dynamics 365 within an aggressive, 14-week timeframe, on time and below budget – two big items that all CFOs look at,” says Advincula. Because of AXIO, the implementation was also delivered 100% remotely, with ZERO travel and expense to BPB – saving the firm thousands of dollars. By saving implementation time and money, BPB was able to purchase additional modules and accelerate its phase two implementation of HR/payroll, time and billing, and CRM, which is currently in progress.”

System Benefits

Dynamics 365 is enabling BPB to make faster, more informed decisions. It’s also enabling BPB to connect to other apps and services, including its new banking institution platform. “Prior to Dynamics 365, the multiple systems provided a wide range of desegregated data, and now we have what I like to call the ‘holy grail,’ or one version of the truth,” says Advincula. “Because of this, we’ve been able to develop a very defined way of incentivizing our professionals and CPAs correctly. After all, we are a people-driven business, so we drive growth through incentives.”

BPB is also able to close the monthly books faster, deliver robust reporting and increase profitability with business intelligence. “Month-end closing was previously taking us 15-17 days, and now it only takes three,” says Advincula. “Our staff is now able to spend the time they have gained on value-added analysis instead of reconciling information from disparate systems, which saves us money.”

BPB has also reduced the risk for error by eliminating dual entry and manual processes. “We’ve turned a very frustrating process—hours and hours looking for discrepancies in the numbers—into a rewarding process.”

Phase 2

BPB is looking forward to the benefits it will experience after payroll/HR, time and billing and CRM is implemented in phase 2 of the project, currently in progress. “We’ve never had relationship management and sales pipeline processes in place, and with CRM, we will be able to track our clients from the first conversation, all the way to payment, which will be a seamless, efficient process,” continues Advincula. “Once we have time and billing integrated, we will be able to look at each client by profit and loss, by professional and even partner level, and drill down to any specific variable,” says Advincula. “This will drive management reporting on empirical and forecasting data for decisionmakers in the business.” BPB will also be able to address discrepancies in time and billing in a proactive manner.

Looking Ahead

BPB and Velosio look forward to a rewarding partnership in the future. “It has been a very positive partnership so far, and I’m excited to see where the growth of our partnership will take us beyond the implementation,” says Advincula. “I believe it will be a mutually rewarding opportunity for both of our firms, and we’ve already referred one of our clients to Velosio,” concludes Advincula.

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- Andres “Andy” Advincula
CFO

Discover how Velosio can help your business with Microsoft Dynamics 365 business applications.

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