



CLIENT SOLUTION CASE STUDY

Global Strategy Group Better Serves Clients with a Modern, Comprehensive Business Management Solution

MICROSOFT DYNAMICS 365

Customer: Global Strategy Group

Industry: Professional Services, Public Affairs, Communications and Research

Headquarters: New York, NY

System: Microsoft Dynamics 365

CHALLENGE: Outgrowing Salesforce, Global Strategy Group needed a comprehensive, modern business solution for improved customer relationship management, project automation, and business management.

SOLUTION: Global Strategy Group selected Dynamics 365 Project Service Automation and Dynamics 365 Business Central to gain better project control, ensure deliverables, and increase productivity.

BENEFITS:

- Gained ability to track clients from opportunity to project tasks and billing in streamlined system
- 34% less expensive than Salesforce in monthly licensing fees
- Can easily monitor project team utilization and quickly respond to any over-utilization to ensure profitable service delivery.
- Submit, approve, process, and reconcile time anytime, anywhere
- Ensures sales credit is given to the right people on project completion
- Streamlined scheduling with real-time visibility to resources availability using a unified scheduling engine
- Replaced manual processes with streamlined reports and improved productivity

CLIENT OVERVIEW



Global Strategy Group, (GSG), is the go-to public affairs, communications, and research partner for companies, causes, and campaigns. GSG works with its clients to build their reputations, tackle big challenges, and win. What sets GSG apart? Being data-driven, politically-attuned, and results-oriented—measuring its success through its clients' outcomes.

Taking Systems to the Limit

GSG, a public affairs, communications, and research firm headquartered in NYC, outgrew its Salesforce solution for CRM, and was limping along while trying to use it for project management. “We tried to turn Salesforce into a project automation system by customizing it, but it was no longer working for us as our project complexities grew,” says Andrew “Andy” Ho, senior vice president, technology for GSG. “We were at the end of a multi-year contract with Salesforce and asked that it be extended with the same pricing, but they told us ‘no,’ and were going to increase an already expensive subscription by 7%. Our mood was immediately dampened on Salesforce, and we looked to other solutions,” continues Ho.

GSG looked at several different systems, including NetSuite, Sugar CRM, Zoho, and more. “It came down to Sugar CRM and Dynamics,” says Ho. “Sugar was less expensive than Dynamics but would have required building the PSA functionality within it like we did with Salesforce. Dynamics had all the core functionality that we needed from a PSA and CRM standpoint, but we thought that the flow from sales to PSA was a little rigid. For instance, within Dynamics, an opportunity must become a contract, which becomes a quote, project, and then task, and that added about three times more steps than we needed. Microsoft Dynamics and Sugar were both less expensive than Salesforce, so we decided to go with Dynamics with some customization on the user interface to streamline those steps,” continues Ho.

Velosio Partnership

Microsoft recommended that GSG work with Velosio as a partner given its longstanding PSA experience. “From the beginning, working with Velosio was a very positive—never negative—experience,” says Ho. “The Velosio team understands our business, and how we think about our processes. They helped us streamline how an opportunity becomes a project within the system. We always felt like Velosio’s best interest was our best interest, and that they were not just trying to make a profit,” continues Ho.

Velosio helped GSG customize the software so that revenue and sales credit are recognized after a project is delivered, and not at the time of sale. “Our business is unique in that we don’t have a dedicated sales team—our partners and senior staff are responsible for selling and delivering successful projects,” says Ho. “To help incent that, full credit for a sale is not given until the project is completed and the project’s revenue is fully recognized. Velosio helped us think through the steps so that the software would follow this process—previously very manual for us.”



Dynamic Benefits

Right off the bat, GSG started saving monthly, as Microsoft licensing is 34% less expensive than Salesforce. “In an apples-to-apples licensing comparison, Microsoft is already cheaper than Salesforce, but we save additional money because the license tiers work out better for us,” says Ho. “In Dynamics, you don’t need a full license for team members who just need to view information, and not edit or add to it. In Salesforce, we were paying full licenses for all employees regardless of their editing needs,” explains Ho.

“The biggest advantage of Dynamics is that it gives us one, cohesive system, or a single version of the truth for all of our accounts and business contacts,” describes Ho. “We now have the ability to track everything from opportunities through to projects. And Power BI has made a big difference to our business. At first, we did not fully grasp Power BI, but we recently added an in-house employee to help us build out dashboards and reports, and this has been very beneficial to the business,” continues Ho.

One example where Power BI has helped is for utilization reports. “The majority of our projects are fixed price projects, and we need to pull utilization information to understand how employee time is being spent, protecting against over-utilization,” says Ho. Power BI reports pull in hours and billing rates, so that account managers can compare utilization against what was scoped out, which helps improve project quotes moving forward, and catches billing mistakes. These reports which previously took hours to compile, and were often outdated, are now available for team members to drill down into up-to-date information, helping them make intelligent decisions to get the most out of billable resources.

“Dynamics has worked its way into becoming our core de-facto system,” says Ho. “Everyone accepts it as the status quo, just as they accept Office 365. That’s what we use, this is how it is. It tracks everything, and it just works, and works well,” says Ho.

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Senior VP, Technology

Adding Microsoft Dynamics 365 Business Central

GSG recently added Business Central to its Microsoft Dynamics 365 system, replacing Sage 50. “Sage 50 is really for mom and pop shops, or single user freelancers, and we maxed out every possible use of the system,” says Ho. “There were no team controls or checks and balances for different roles.” The chart of accounts was very limited, so our finance team had to come up with very long account numbers to track multi-dimensions. It was installed on our cloud server, so team members had to Citrix into the server, and it was slow, limited on reports, and we had to do a lot of things manually,” continues Ho.

The main goal in upgrading is to move to a more modern ERP system scaled for a growing, mid-sized business with increasing complexities. “I’m surprised by how underserved the mid-market is for ERP systems,” says Ho. “Our choices were small mom and pop systems like Sage 50, or taking a huge leap to Oracle, built for massive manufacturing firms. Everything in between felt like a dead zone. We looked at Sage Intacct, Acumatica, NetSuite, and Dynamics 365 Business Central.

Acumatica fell off the list because it wasn’t exactly what we were looking for. NetSuite didn’t make sense as an accounting system without CRM and PSA, and Intacct was orders of magnitude more expensive than Business Central—like 90% more expensive. We felt as if BC was perfectly geared for our industry, size and marketplace, and it was a good price,” says Ho. GSG is implementing Microsoft Dynamics 365 Business Central now, and is looking forward to increased productivity, and integration between its CRM and PSA systems.



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