



How the Right Microsoft Partner Can Drive Business Success





For today's small and medium-sized businesses, the right technology partner can be the key to unlocking revenue streams, initiating and nurturing customer relationships, and inspiring creativity and collaboration among employees.

Unfortunately, for many businesses, their technology partners have let them down. For example, CIO magazine reports that around one-third of all customer relationship management (CRM) projects fail. For enterprise resource planning (ERP) projects it is even worse. Analyst firm Gartner estimates that 55% to 95% of all ERP projects fail to meet their objectives.

Botched implementations are the most visible failure. However, there is another, less obvious way that technology partners miss the mark in meeting the needs of their customers - simply by not meeting their needs. Too many partners are singularly focused and don't have the knowledge or resources to add value to the digital journey of a growing and changing business.

A top partner is committed to your whole business and provides a comprehensive set of solutions and services ranging from business applications to managed services to development. Without a holistic view of new technologies and strategies, your partner could be hindering your growth and standing in the way of IT operations that are modern, secure, and scalable.

No matter what size business you are, Velosio understands you aren't just buying software. You need to solve business challenges, and those challenges change over time. We help you move with confidence to what's next on your digital journey. And, we provide momentum, expertise, and insight to make your journey a success.

Read on to see how Velosio has contributed to our clients' success.





Berkowitz Pollack Brant Supports Growth with Dynamics 365

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. See how the move to Microsoft Dynamics 365 helped put them in a position to grow and be more profitable.



Port of Anacortes Sets Sail to Productivity with Cloud Upgrade

Port of Anacortes needed to replace its aging, older version of Microsoft Dynamics SL on-premise solution, as it was frequently crashing, causing disruption to business operations. Implementing Microsoft Dynamics 365 Business Central creating efficiencies and had some unexpected benefits.



Neundorfer, Inc. Gains Confidence in Reporting with Cleaner Data

Three separate systems and lack of integration between financial, manufacturing, and sales software proved inefficient and costly for the utility OEM. New ERP and CRM solutions allowed for a new approach to business with cleaner data.



McStain Neighborhoods Makes the Move to Improved Profitability

McStain's growth was outpacing QuickBooks, and it needed to integrate back office accounting data to its BuildTopia homebuilding software and replace manually-driven processes. Read how Velosio helped make the transition to a new ERP system as well as optimize reporting with Power BI.



CLIENT SOLUTION CASE STUDY

Berkowitz Pollack Brant Supports Growth with Microsoft Dynamics 365

The Challenge

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

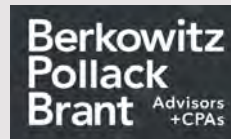
Solution

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.

Results

- 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



INDUSTRY: Professional Services, Accounting

LOCATION: Miami, FL

SYSTEM: Microsoft Dynamics 365 for Finance and Operations

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.

“QuickBooks had significant limitations for us,” says BPB CFO, Andres “Andy” Advincula.



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” Advincola. “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 Advincola. “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 Advincola.

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 Advincola. “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 time frame, on time and below budget – two big items that all CFOs look at,” says Advincola. 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 Advincola. “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 decision makers 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.

“Velosio had the most experience of all the other partners, and they gave the best presentation that we saw.”

- Andres “Andy” Advincula
CFO





CLIENT SOLUTION CASE STUDY

Port of Anacortes Sets Sail to Improved Productivity with Cloud Upgrade



Client Overview



INDUSTRY: Government, Tourism

LOCATION: Anacortes, WA

SOLUTION: Microsoft Dynamics 365 Business Central

The Port of Anacortes was created in 1926 to provide for the development and maintenance of harbors and terminals, promote tourism and foster economic activity in its district. The Port is instrumental to the success and economic development of the community with its 1,000+ slip marina and its roughly 80 acres of commercial properties. The Port is independent from other local or state governments.

The Challenge

Port of Anacortes needed to replace its aging, older version of Microsoft Dynamics SL on-premise solution, as it was frequently crashing, causing disruption to business operations.

Solution

Port of Anacortes selected cloud-based Microsoft Dynamics 365 Business Central.

Results

- Easily allows for remote work environment, faster than their slow VPN connection
- Reliable, modern cloud-based solution
- More user-friendly interface
- Provides true “self-service” access to information without asking Accounting
- Cost-effective implementation
- Velosio is quicker to respond to support questions than previous partner

Aging Dynamics SL Solution

The Port of Anacortes finance team was a long-time user of Microsoft Dynamics SL, but the screens began to crash more and more often. “We didn’t know if it was the aging technology that was making the screens crash, but we became increasingly frustrated, and we weren’t big fans of the user interface anyway,” says the Port’s Accounting Manager, Wendy Fauver. “Our IT Manager and I discussed upgrading for a couple of years, as the AR side of the system was not very user friendly, and we perceived the solution to be only for project-based companies—not a great fit for the Port,” continues Fauver.

Fauver attended a presentation on Microsoft Dynamics 365 Business Central at a Microsoft Dynamics SL user group conference. “During the conference we became interested in looking at it more seriously,” says Fauver. “When I got home, I signed up for the free two-week trial of Business Central and started playing around with it. It seemed more user friendly, so we started down that route,” continues Fauver. After reviewing and processing dummy transactions through the trial, “We felt that Business Central was an improved version of Dynamics SL,” says Fauver. “We concluded we didn’t have to look at other solutions.”

A New Solution and Partner

Port of Anacortes was working with another Microsoft partner for their Dynamics SL solution but had not been happy with their level of service for some time. “Our IT Manager, Anthony, and I talked about it, and we decided it would be a good time to move to a different Microsoft partner since we wanted to upgrade anyway,” says Fauver. “We researched different partners, interviewed them, and discussed cost and migration with them. A big consideration for us was the cost of the implementation since we are fairly small with a staff of only three in Accounting. Would this be worth the cost? Would it increase our productivity? Velosio gave us an upgrade offer that was very competitive price-wise, and we were comfortable with the folks we interviewed, so we selected them as our partner,” continues Fauver.

“I appreciate how quick Velosio is to respond to our questions and concerns,” says Fauver. “I’ve never had to wait two days for a response like I have with other partners—Velosio’s customer service is great.”



A Remote Work Environment

After going live with Microsoft Dynamics 365 Business Central, and working with the system for nearly a year, the world was shut down from a worldwide pandemic—COVID-19—but the Port of Anacortes team was able to work from home efficiently in the cloud—something that wasn't available to them with Dynamics SL on-premise. "The cloud-based technology has really saved us during this time," says Fauver. "In the past, our IT Manager would set up a VPN connection for us if we needed to work from home, but it was slow and very inefficient," continues Fauver. The Port's airport, marine terminal, and marina remained open to serve vital roles for emergency services access and ensure the transport of needed goods to market, but the main port office and harbormaster's office closed to the public with staff working remotely by phone and email—including the accounting staff. "With Microsoft Dynamics 365 Business Central in the cloud, we all efficiently worked from home during the shelter in place," describes Fauver.

There have been some bumps in the road, but Fauver looks forward to attending the virtual Business Central user group coming up, and to learning more about Power BI. "Since we used Dynamics SL for so long, we were so used to it, but I'm a big proponent of giving some time to get used to a new solution." Now that Port of Anacortes has a year of experience with Business Central under its belt, the team is looking to add Fixed Assets to its AP, AR, and GL configuration.

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- Wendy Fauver
Accounting Manager



CLIENT SOLUTION CASE STUDY

Neundorfer, Inc. Gains New Confidence in Reporting with Cleaner Data

The Challenge

Lack of integration between financial, manufacturing, and sales software proved inefficient and costly.

Solution

Microsoft Dynamics provides an integrated solution that meets all of Neundorfer's requirements. Velosio provided a business process review that set the course for efficiency.

Results

Business intelligence data now is readily available and quick to retrieve. Integration across departments builds efficiency and improves quality. Best practices eliminate waste and save labor.

Ready for a Clean Sweep

Until recently, Neundorfer utilized Sage MAS 90 ERP with GoldMine to handle its ERP and CRM requirements and a third-party package for managing manufacturing. With three separate systems, gathering meaningful data was a struggle.

Client Overview



NEUNDORFER


INDUSTRY: Clean Technology

LOCATION: Willoughby, OH

NUMBER of EMPLOYEES: 50

SOLUTIONS: Microsoft Dynamics GP, Microsoft Dynamics CRM

With the passage of the Clean Air Act, electric utilities and companies in other heavy industries called upon original equipment manufacturers (OEMs) to improve their precipitators and install new ones. Neundorfer offers innovative technical services, products, and strategies to optimize the performance of air pollution control equipment. Their cross-discipline, goal-directed, analytic approach to solving customer problems consistently delivers results.



Jean Ockuly, Vice President of Finance for Neundorfer explains, “We were constantly looking for workarounds that would allow us to get the data we needed to run the business. We’d extract data from each package and re-enter it on spreadsheets to get the desired reports.”

One such report, an order backlog report, took a day-and-a-half to produce. “We’d pull data from our accounting system, our manufacturing system, and our CRM system to get a complete picture of open orders, expected bookings, and cash expectations,” adds Ockuly.

A Big Breath of Relief

Neundorfer looked at other solutions before deciding on Microsoft Dynamics GP and Dynamics CRM. “We looked at updating our Sage MAS 90 software and we looked at upgrading to Sage MAS 500, adding Sage SalesLogix for CRM. Ultimately though, we decided that a Microsoft solution was the best choice for our organization. It offers a powerful, integrated ERP, project accounting, manufacturing, and CRM solution, with an SQL database.”

Velosio proved instrumental in helping Neundorfer reach its decision. Representing both Sage and Microsoft solutions, Velosio was able to help the company perform a deep comparison of

each system and help determine which would best meet Neundorfer’s needs.

“They approached the project with a problem-solving mind-set, not a sales mind-set,” says Ockuly. “We were confident that if they didn’t think they had the right solution for us, they would tell us.”

Process Review Adds Value

Neundorfer partnered with Velosio to complete a comprehensive business process review. Velosio worked with the staff at Neundorfer to identify current business processes and develop best practices going forward. “This was invaluable,” says Ockuly. “By involving our entire team in the process, getting their feedback and buy-in, we were able to streamline many operations.” As evidence of this, Ockuly points out that the company’s weekly production meeting now takes just 20 minutes instead of the hour it used to consume. “Every week, each of the eight people in the meeting saves 40 minutes — that’s a significant savings.”



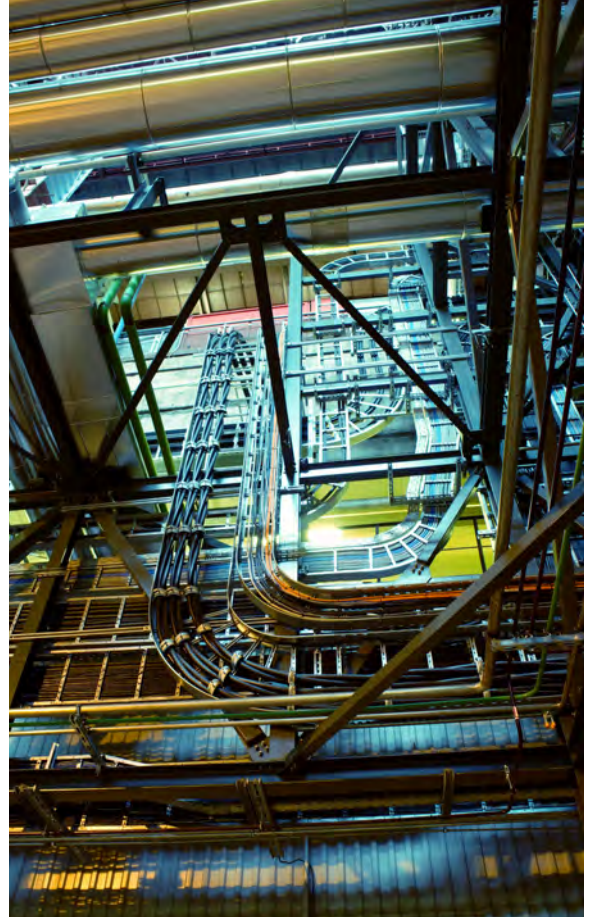
A Culture Of Confidence

The company's Microsoft Dynamics solution delivers integrated functionality from the manufacturing floor to the sales staff, from accounting to the field service representatives. Ockuly says she has new confidence in the data she receives. "We used to spend hours generating reports with data from disparate systems that were outdated before they were complete." By utilizing the Microsoft SQL Server, Neundorfer no longer needs to spend up to 8 hours each week creating the company's most vital report. Now they can monitor cash flow, projections, total backlog, and other key performance indicators in real time. A computer monitor hanging prominently in the Neundorfer facility streams current data from Microsoft Dynamics, including sales figures, production costs, and backlog volume, intended to keep employees aware of the dynamic business climate. "People constantly refer to it and work to boost sales and minimize costs as a result. It's a highly effective tool and resource," says Ockuly.

Ockuly witnessed a positive cultural shift since the conversion. "Across every department, our staff understands the value they add to the company and the importance of their positions and the work they do. They look for ways to improve our operations, and that leads to better quality for our customers," she says.

Optimize Sales Processes

Velosio's process review had a positive impact on the rollout of Microsoft Dynamics CRM. The sales cycle and workflow were defined, and requirements for each step were formalized. As a result, the software is delivering detailed metrics spanning CRM, ERP, and manufacturing data that Neundorfer can use to refine its sales cycle and better predict and schedule its production runs. "Velosio has been a true partner in the project, offering exceptional advice that helps us continually improve our operations," concludes Ockuly.





CLIENT SOLUTION CASE STUDY

McStain Neighborhoods Makes the Move to Improved Profitability



The Challenge

McStain's growth was outpacing QuickBooks. The company needed to integrate back office accounting data to its BuildTopia homebuilding software and replace manually-driven processes.

Solution

McStain worked with Velosio to assess business processes, uncover opportunities to gain efficiencies, and selected Microsoft Dynamics SL integrated with BuildTopia, to gain better control over their data.

Results

- Developed a Power BI template for project accounting
- More easily makes informed decisions with intelligent data
- Better able to define customer profitability and building cost
- Reduced redundant data entry
- Added efficiency to accounting staff
- Improved reporting
- Ability to manage growth goals of 500%+
- Cut month-end closing time by 25%+

Client Overview



INDUSTRY: Construction and homebuilding

LOCATION: Denver, Colorado

NUMBER OF LOCATIONS: Two

SOLUTIONS: Microsoft Dynamics SL and Power BI

McStain Neighborhoods is a sustainable homebuilder that understands the energy you use in your home can harm the environment, deplete critical energy sources and cost you money. Sustainable McStain homes can save its customers more than 30% on utility bills, while remaining mindful of the environment.



Supporting Growth

McStain Neighborhoods was using QuickBooks for accounting functionality, and quickly outgrew its capacity. The team at McStain spent considerable time with a consultant to review its workflows, processes and pain points. McStain also considered alternative construction management solutions which would also encompass accounting functionality, but in the end determined that keeping BuildTopia for construction management and replacing QuickBooks with Microsoft Dynamics would be the most cost-effective, efficient path. The consultant referred McStain to Velosio.

Microsoft Dynamics SL

Selecting Microsoft Dynamics SL was a quick decision for McStain. After Velosio demonstrated the capabilities of Microsoft Dynamics SL, as well as the integration with BuildTopia to McStain on a Friday, the team requested the paperwork to sign the deal on the following Monday. “One of our initial concerns with switching systems was price versus cost,” says McStain COO David Spahr. “The initial expense was considerable but the cost to McStain for not making the move was greater.”

Velosio began the implementation and go-live was just four months later. “Our then CFO had previous experience with Dynamics so familiarity with the system was not an issue, but it was an all hands-on deck event,” says Spahr. “Preparing historical data for conversion was time consuming. The greatest fear was picking the date to convert and committing to that date...this was no easy task.

As a small company we rarely are faced with wholesale technology changes. This was a big step, but it has moved us in the right direction,” continues Spahr. After go-live, Velosio completed training on-site for the McStain team, with a goal to “train-the-trainer” so that additional new staff could be quickly brought up to speed.

Power BI

To fulfill reporting needs, McStain turned to Power BI to analyze data specific to project accounting. “Power BI is a dynamic product, and the best thing about it is that once the desired dashboards have been created, it’s just about adding data to existing reports and hitting the refresh button,” says JC Rose, controller for McStain. “In our monthly staff meeting I’m now able to present data in a much more visual format that enables us to make better business decisions. I am looking forward to learning more about the program as we have only scratched the surface of its capabilities.”

System Benefits

The McStain team first experienced benefits in accounting. “With Dynamics, we are much more efficient,” says Rose. “Intercompany is especially beneficial to us as we work with general contractors on a lot of different projects. Reporting is much better as well. Dynamics is a much faster system than QuickBooks. We can very efficiently go in and out of multiple companies, whereas with QuickBooks we had to login and logout of every company one by one.

We can manage as many projects as we need, and still be very efficient. The goal at McStain is to grow over 500% over the next few years, and we are confident Dynamics can manage this amount of growth, and we won't need to add more accounting employees," continues Rose.

"It's a good system," says Rose. "I would recommend it. The reporting is really, really good. Our CFO and Financial Analyst both get all of the data they need out of the system. Journal entries used to be a huge task, and now we can just copy and paste them in from project to project and it saves so much time. Dynamics has cut our month-end closing time down by 25%, maybe more," continues Rose.

Velosio Support

McStain has also been pleased with the support they receive from Velosio. "With Velosio, we get all of the support that we need for the system," says Rose. "When we email them, they are on it right away, and are very helpful. They have been helpful regarding Crystal Reports and Management Reporter as well."

BuildTopia Integration

"The integration between BuildTopia and Dynamics is working just fine," says Rose. "As long as we build a project in BuildTopia correctly, it integrates well to Dynamics." With integrated accounting, sales, marketing, and construction management information, McStain now has a better understanding of which community plans are most profitable.

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- JC Rose
Controller, McStain



MOVE WITH CONFIDENCE ON YOUR DIGITAL JOURNEY WITH VELOSIO



Don't lose ground because of status quo business practices. With the right Microsoft partner, you can break through to a new ways of managing finance, operations, sales, marketing, service, and much more.

Velosio delivers fresh ideas and unmatched know-how for cloud, ERP, CRM, business intelligence, office automation and other business solutions.

With Velosio, you can fast-track results with rapid-deployment methodologies, accelerate your time to market with our industry expertise, and enhance implementations with our range of services including development, support, and managed services.

Velosio was created with the sole intent of serving our clients better than any other partner in our business. You can count on us for innovative technology, specialized expertise and a strategic partnership.

Our team is excited to help your organization succeed. We are committed to your business and value the opportunity to work with you.

READY FOR A BREAK-THROUGH? CONTACT US TODAY!

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