Velosio ®

CLIENT SOLUTION CASE STUDY

Moore's Electrical & Mechanical Connects Their Entire Team with Teams, Microsoft 365 & Solver

MICROSOFT 365

Early Adopters

With a large field-force providing services and working projects in dozens of locations, Moore's recognized early the need to keep everyone in touch. Nearly a decade ago, they chose to install Microsoft Lync using on-premises servers and infrastructure. Over time, they upgraded and transitioned to its successor, Skype for Business.

With numerous back-office staff, and hundreds of mobile users, the IT team at Moore's quickly recognized the value available to them in continuing to follow their path in Microsoft communications platforms and planned a transition to Microsoft Teams. Since they were still using an on-premises Exchange Server for email, it also made sense to move their operation to Microsoft 365.

Accelerated by the Pandemic

As was the case with so many companies, the outbreak of the Covid-19 novel coronavirus prompted Moore's to accelerate their progress to the cloud. Moore's IT Project Manager, Stephen Overstreet, recognized the increased value his company would enjoy.

CLIENT OVERVIEW

MOORE'S
ELECTRICAL & MECHANICAL

Founded in 1985 by Dale Moore, Moore's Electrical & Mechanical Construction, Inc., offers complete Mechanical, Electrical, & Plumbing service from new construction and design-build to renovations, retrofits, high voltage installs and control systems. They also have over 100 technicians providing HVAC-R, electrical, plumbing, refrigeration, automation and controls, facilities management, and other services across Virginia and North Carolina, from 24-hour emergency service, to planned maintenance, equipment upgrades and changeouts. The company is located in Altavista, VA, has 550 total employees across all its locations, and generates between $50M and $100M in annual sales.

"We wanted to stay in the Microsoft ecosystem," explains Overstreet. "Our mail server was on the radar for replacement. Our best strategy was to hit the cloud full on and migrate everything out there. That way you can integrate everything, so it all works seamlessly, and you're up to date all the time."

The Right Implementation Partner was Already in Place

"We go back with Velosio a long way," explains Stephen Overstreet.

Years earlier, Moore's was experiencing significant difficulty with the technology partners they were using to manage their Microsoft Dynamics SL enterprise resource planning (ERP) system. While seeking another Microsoft partner to replace them, they encountered Velosio.

After Velosio upgraded their Dynamics SL system and solved the problems they had been experiencing, the Moore's IT team's decision was made easy. "It just made sense," explains Overstreet. 'Since we had found a good reseller that we like to partner with, we'll throw everything Microsoft that we've got at them to see if they can handle it. Obviously, Velosio can!"

While he is very happy with the efficiency and quality of Velosio's recent implementation of their entire cloud infrastructure, Overstreet happily acknowledges, "I bet we're not using it to its full potential yet!"

He describes the call center he has operating using Teams, and how much their front-desk receptionist loved her new Teams interface. "She very much wants to provide our customers with a positive experience," explains Overstreet. "Now she says she can do her job better than ever. She can forward calls to literally anybody in the company, and they can answer that call on Teams. She can see out-of-office status in her console and opt to forward the call to another resource."

Solver Solves a Big Challenge for Their CFO

As part of the Microsoft 365 transition, Velosio helped Moore's Finance Team select, implement and learn how to effectively leverage Solver to enhance their financial and operational reporting.

Overstreet explains that the company's CFO required comprehensive reports, which includes significant wrangling out of Dynamics SL, not to mention an interest in gaining analytical insight at the click of a button. "He couldn't get what he wanted out of SL easily," explains Overstreet. "He always had to come to me to pull the information required."

In conversations with Velosio's consultants, it was determined that they could readily alleviate the immediate reporting problems with the Solver corporate performance management (CPM) solution, while also establishing a foundation for future planning (budget/forecast) and analytical dashboarding capability through Microsoft Power BI.

"Sure enough," continues Overstreet, "now he has the ability to filter and run reports as required. I think he's even learning how to edit and create new ones. Solver CPM is really in his wheelhouse."

Solver turned out to be the ideal solution to enable the Finance Team's reporting and the analytic agility that historically required numerous manual edits and significant reliance on Excel to complete.

A Very Satisfying Journey

Building on the recent success, Overstreet looks forward to their next steps, including a potential transition from Microsoft Dynamics SL running on-premises to Microsoft Dynamics 365 Business Central in the cloud. With Solver, Teams and Microsoft 365 in place, Overstreet sees great efficiencies to be gained from the end-to-end integration of the entire Microsoft stack. This includes having relevant Customer information available as the customer calls into the call center allowing improved queueing action and alignment to the Moore's Services Team.

Overstreet expresses how happy he has been with Moore's relationship with Velosio, and how enthusiastic he is about recommending them. "If someone asked me, I would simply tell them the whole history of our long partnership with Velosio. It's been a great journey so far, and we're looking forward to more."

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

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