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Ornamental Plant Nursery Positioned for Success with Microsoft Dynamics 365 Business Central

MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

Nursery leverages Microsoft Dynamics 365 Business Central for better visibility into finance and production, and to better serve customers.

Challenge

A Canadian-based ornamental plant nursery found itself growing 20% year over year for more than 20 years. Previously, the organization was using a mix of systems to run their business, Office 365, QuickBooks and Macola. "I wanted to change our previous solution since the day I started at this company 10 years ago," says the CFO. "I knew the price tag would be high, but as we've grown, our old system was such that the special sauce in finance and inventory management wasn't repeatable. Pick a guy, if he gets hit by a bus, can we keep going"?

Because Macola was an outdated system, the team found themselves planning and purchasing outside the system, with production being managed across 30 different Excel spreadsheets. The team was also struggling with plant availability and specifically knowing how much plant material they had available to sell. Whenever they made a new sale, there was a risk that they may not have sufficient supply to fill the

order. They were operating on a week-by-week basis and physically walking the greenhouse to perform inventory checks.

A major challenge to managing inventory was that their largest client buys plants as a generic item (4" spring annual), while some clients requests product by genus (4" petunia). Another challenge for operations was managing space and understanding space requirements for production, especially for hanging baskets. Space planning relied heavily on tribal knowledge and was not a repeatable process. The nursery wanted to leverage technology to better support their business and help them operate more efficiently.

Solution

The team considered AgriWare, Sage and Microsoft Dynamics 365 Business Central, (BC), as potential ERP solutions, and landed on BC because of its inherent simplicity, substantiation that it was the most future-proofed solution, and

its affordability long-term. "I was so excited about what I saw is possible with BC reporting," says the CFO. "I did a 10-year cash flow comparing the price of the ERP solutions we considered, and BC was the lowest cost." Availability on any device, anytime was appealing to the ownership team who can access information on the go. "I do feel like we've landed on the right solution for us for a while," says the inventory manager. "It seems like lot of organizations in our industry end up switching solutions often, sometimes even every year, and we feel like we won't have to do that with BC."

The BC solution is integrated with EDI through SPS Commerce and online banking. "We connected to online banking and kept trouble shooting until it worked," says the CFO. "Our Velosio implementation specialist figured out why the link kept breaking, and now it's so great to be able to see how many transactions haven't been processed and to know where we are at—it has made a huge difference because that was a huge black hole for us in the past," adds the inventory manager.

Implementation

The client describes the implementation: "We are a unique client because we were eager to learn the new solution, particularly because we were so fed up with the old system," says the company's CFO.

"Training was a little 'click through as fast as you can,' and felt out of order because we weren't hands on with the solution at the time," adds the CFO. "It was very difficult to follow the proper flow for training because it was going over things we already had to learn on the fly," according to the inventory manager. "The good news is that any problem you come across in BC, somebody else has already figured it out, and there's likely a how-to video explaining how to fix it which is just a couple of clicks away," says the CFO. "Very often I'll have BC on one screen and the Microsoft help portal on the other with a step-by-step walk through. With Macola, we had to submit a help ticket, wait for someone to help us, and then login to try to figure out the information. With BC, Microsoft doesn't care who looks at their help videos," says the CFO. "There's a 'learn Dynamics' channel that I watch every day now while trying to work on planning," adds the inventory manager.

"Our implementation specialist was an absolute rock star," says the inventory manager. "She was so good. When I told her the training wasn't adequate, she shifted gears in a second instead of pushing her agenda. She was really, really, awesome, and great with customizations, understanding everything right away the first time," continues the inventory manager. "She wasn't ticking boxes on what she wanted to get done, but instead worked on customer success 100% of the time," adds the CFO.

The most important goal for the implementation for the nursery was to implement best practices, instead of repeating how they did things before. "We constantly ask Velosio, how do your clients do this the best way, and why,"? says the CFO. "The system is so dynamic."

Business Benefits

Prior to its busy season, the team has experienced early business benefits. "Having a repeatable process is already a vast improvement," says the CFO. "I don't feel like I'm yet doing things faster, but I'm doing them better," says the inventory manager. "Before, I felt like the gatekeeper of information. I know that our upcoming busy season on the new system is probably not going to be perfect, but I'm very hopeful and positive about it, even though there is a nervousness about it. Previously, we kept things simpler without as much detail, so now that we have a new system with the ability to add more details, those will need to be maintained."

"For us, BC is night and day in every level of the business, just because of how far in the dark ages we were with our previous solution," says the CFO. "I like having a high-level view of things I need to know this week, making it easy and accessible. I can now follow up on things before they become problems," adds the inventory manager. "Every landing page is customizable, so that we can see something as simple as which PO to expect this week. It sounds so obvious, but I couldn't do that before unless I built myself a custom report. All the information is now at my fingertips."

The plant nursery has experienced early business benefits from replacing their legacy solution with BC, including:

- Improved reporting
- Cash Flow statement which is repeatable a vast improvement
- Better information for management on their phones, anywhere, anytime
- Easier to forecast labor needs
- Improved visibility into production
- Can easily see upcoming Purchase Orders without having to write a time-consuming custom spreadsheet
- Greeted every morning with customized filters and aggregated dashboards for different roles/hats
- eBanking integration has increased visibility into transactions
- Accounts Receivable now ties to Trial Balance
- Better insight into employee productivity
- No longer relying on Microsoft Excel as system of record

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