



CLIENT SOLUTION CASE STUDY

Global Strategy Group Tackles CRM, PSA and ERP in Modernization Project with Microsoft Dynamics

MICROSOFT
DYNAMICS 365

Salesforce as a Project and Timesheet Solution?

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. “When I started at GSG over eight years ago, I was the first full-time IT hire at the company that had been in business over 20 years,” says Andrew “Andy” Ho, senior vice president, technology for GSG. The leadership team at GSG knew it was time to develop a structured, modern IT strategy to support growth and remain competitive.

“Salesforce had been modified to the point where it was a PSA or professional services automation system, and a timesheet system,” says Andy. “I told the team: ‘you realize that outside of these four walls you’re not going to find a single person that refers to Salesforce as a timesheet system.’ It was no longer working for us as our project complexities grew. 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 Andy.


The first areas that Andy tackled were immediate pain points around file management. “GSG was still on network drives, and had already run out of server space,” says Andy. An additional challenge was that his part time IT predecessor had ghosted the company without leaving passwords behind. “I had to try to guess and decipher what

CLIENT OVERVIEW



Founded in 1995, Global Strategy Group (GSG) began as a Democratic polling firm operating predominantly in the New York market. Over two and a half decades, the firm has evolved into a full-service research, public affairs, and communications agency, working with top Fortune 100 companies at the center of some of the nation’s most complex and exciting challenges. Recently named public affairs agency of the year, today GSG is a diverse team of 150+ talented professionals, seasoned by its work on nationally recognized projects for top corporate leaders, major issue advocacy and cause groups, and leading Democratic campaigns.

www.globalstrategygroup.com



he could have used as a password, which we were eventually able to do, but also concerning,” continues Andy. Additional challenges were around hardware infrastructure – you could say the company had one foot in the cloud. “We were using Office 365 and Salesforce [in the cloud], but everything else was on premise.” Andy began an initiative to move the remainder of the company’s vital business applications to the cloud.

System Comparison

GSG looked at several different systems, including NetSuite, Sugar CRM, Zoho. “As we evaluated applications, Dynamics became the clear choice,” says Andy. “It’s easily the most cost effective and offers everything we need natively. Plus, its integration capabilities with other Microsoft and non-Microsoft applications are impressive.”

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 Andy. “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 Andy.

Andy explains that sometimes it can be challenging to nail down requirements for a new system. Users often describe what they need in terms of what they were doing before. While it’s important to accommodate users to boost acceptance and adoption rates, it’s also essential to focus on the end goal, not the steps you take to get there. “This is where Velosio really helped us,” he says. “They were able to map most of our existing workflows directly into Microsoft Dynamics 365 CE. For other workflows and tasks, they suggested improvements — different ways to achieve our goals that worked within the application’s structure. After a few weeks, people forgot that they ever did it any other way,” continues Andy.

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 Andy. “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 Andy. “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 Andy.

“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 Andy. “We can now track everything from opportunities through to projects. And Power BI has made a big difference to our business,” continues Andy.

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 Andy. 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.


GSG also has much better insight into staff utilization. Its 150+ employees work in six offices—working on multiple projects at once. “With [Dynamics 365 Project Operations], we can see who’s available, who’s oversubscribed, and who has expertise or interest in certain topics, such as environmental regulations or gun control,” Andy says. Previously, this was sorted out by word of mouth and emails—or, Andy says, by sticking your head above the cubicle maze and seeing who was at their desks. “By understanding if we are fully utilizing our current staff, we can better determine if we need to hire more people,” Andy says.

“Dynamics has worked its way into becoming our core de-facto system,” says Andy. “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 Andy.

Adding Microsoft Dynamics 365 Business Central

After Phase one with Customer Engagement and Project Operations, GSG 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 Andy. “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 Andy.





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 Andy. “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 Andy.

A Sophisticated Integration

With Microsoft Dynamics CE and BC, GSG now has a highly sophisticated integration between the two products. “Where our integration between Microsoft Dynamics CRM and Sage was a dirt road, the integration between CE and BC is a superhighway,” describes Andy. “We have a platform that the moment we’re very happy with it - it gets the work done,” continues Andy. “It is scalable and expandable to at least all the things that we can currently foresee, and that’s the best you can hope for, for any system,” continues Andy.

The enterprise-wide Microsoft Dynamics 365 solution connects sales, resourcing, project management, and finance teams within a single application to help GSG win more deals, accelerate project delivery, and maximize profitability. “All of our critical business applications work together — from productivity tools like Office to our ERP, CRM, project management system, and BI tools. And then there’s the Microsoft AppSource marketplace where we can shop for other business tools that extend the value of Microsoft Dynamics 365,” continues Andy.

After implementing the end-to-end Dynamics solution, COVID-19 was a litmus test for the cloud-based solution. “Even though we didn’t previously have a work-from-home culture, when everyone was confined to their homes during COVID, all we had to do was flip a switch because everything was in place to support a seamless transition,” says Andy.

Partnering with Velosio, Andy says, was refreshingly different. “Their focus was on us and our business. It was clear their goal was to provide a solution that fit our needs. That was refreshing,” concludes Andy.



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



888.725.2555



insider@velosio.com

