



CLIENT SOLUTION CASE STUDY

Westerlay Orchids Blossoms Digitally with Velosio and Microsoft Dynamics 365 Business Central Solution



MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

Background

A multigenerational family-run business headquartered in California, the team at Westerlay Orchids has a simple mission: to grow the most stunning and highest quality orchids. Westerlay’s path to producing some of the finest orchids available stretches back generations of horticulturists to the greenhouses of Holland. Company founder Joop “Joe” Overgaag was a greenhouse farmer in the Netherlands before immigrating to Carpinteria, California (along with his wife and four children) in 1978. Westerlay eventually doubled its size to 21 acres and production of over 3.5 million orchids annually. Through it all, the tradition of the company continues, constantly refining its sustainable growing practices to ensure the highest of quality orchids are produced. www.westerlay.com



Supporting Tremendous Growth

Westerlay is embarking on the next wave of progress as the Overgaag visionaries look toward the future. With the addition of new greenhouse space in Carpinteria, total production increased from 3.2 to 4 million orchids in 2021. A second and more comprehensive phase of expansion is scheduled for 2025 as Westerlay develops a new parcel of land in Port Hueneme, CA set to be the future home of the main production facility. This new location will allow Westerlay to nearly double current production to 6 million orchids within a couple years of opening and help work toward its 7-year goal of being the most recognizable name brands in house plants on the West Coast.

OVERVIEW

Software Solutions:

- Dynamics 365 Business Central

Challenges:

- Reporting and Insight Constraints
- Disconnected Systems
- Lack of scalability

Benefits:

- Leverage Data for Better Decisions
- Empower Business Innovation and Growth
- Capitalize on Cloud Technology

Company Overview:

Specializes in growing and supplying exquisite orchids, showcasing a commitment to craftsmanship and horticultural excellence.

Industry: Horticulture

Employees: 130

Headquarters: Carpinteria, California

Annual Revenue: \$27,400,000

On the digital front, Westerlay Orchids launched its first direct to consumer Ecommerce website. This introduction marks the first time in Westerlay Orchids' 42-year history where customers can purchase orchids directly from the greenhouse, shipping to any home or business in the Western US. As Westerlay progresses in the post-pandemic world, direct access to goods and services from the comfort and safety of its customers' establishments is paramount.

Tremendous growth meant that QuickBooks was no longer supporting the organization's financial management and operational requirements. Westerlay Controller Mike Hayes was tasked with finding an ERP solution to replace QuickBooks. Having utilized Microsoft Dynamics AX at a previous organization, Mike knew that he wanted to land in the Microsoft Dynamics space. Mike also spoke with industry associates and their experience moving over to an ERP system. The associates mentioned Velosio, and coincidentally Mike had experience working with Velosio in a prior job and a previous implementation, which resulted in positive results. "I didn't want to over-shop, so I selected Microsoft Dynamics 365 Business Central, partnering with Velosio. I knew that I wanted to avoid being 'nickel and dimed' all the way through the project, and it seemed like that wouldn't be the case with Velosio. They made the sales process easy and quick for us," continues Hayes.

Project Delivery

Westerlay was under pressure to replace QuickBooks quickly because it was no longer supporting them well. Slowdowns and freezing of the system were becoming a daily occurrence. Tasks that had once been simple were now taking hours to complete. Some employees had to stagger shifts to limit overlapping users in the system. In addition, most reporting was done using spreadsheets because the application lacked the sophistication and flexibility to track what was critical to the company.

Go-live was successful with no major issues. "Data prep and upload went pretty smoothly, and it was beneficial that our consultants were onsite, even though it was during COVID," describes Hayes. "Not only was the partner important, but a successful go live could also not have been achieved without strong staff commitment. The success of our implementation was almost entirely due to the positive outlook that everyone here at Westerlay had during the entire process. Starting with the leadership here, which wholeheartedly supported the project and made sure that everyone was on board. We did not have one person that was not a proponent of what we were trying to accomplish and the need

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- Mike Hayes
Controller, Westerlay

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to make this a success. While we did experience pains along the way, which was to be expected, and additional time and effort was required of all users during the entire process, it would have been much more difficult if it was not supported by everyone.”

Strong Project Management

Velosio’s project managers performed weekly check-ins with the Westerlay team. “These check-ins were beneficial to helping us stay on task. The Smartsheet tool that they used was helpful, as well as the dashboard reports, which I was able to provide to the leadership team,” says Hayes.

Westerlay purchased an unlimited support plan from Velosio and finds that to be helpful when questions or concerns arise. “I find the unlimited support to be valuable— it takes the pressure off our team to find out what’s going on when there’s an issue. It’s helpful to know that folks can easily reach out to Velosio for help,” says Hayes.

Benefits of Moving from QuickBooks to Business Central

Business Central has almost 800 features that QuickBooks does not offer. Business Central is not only accounting software, but also an ERP solution that integrates Westerlay’s whole business and all the data in one platform.

Some extra features that Business Central offers over QuickBooks includes:

- Expanded billing format options
- Stronger reporting capabilities
- Clear system audit trails
- Multi-lingual functionality
- Familiar Microsoft interface
- Intelligent data management that collates data from several departments
- Flexible scalability
- Efficient project management
- Detailed warehouse and supply chain management
- Easy integration
- Enhanced data security and compliance
- Low cost of ownership

Ongoing Improvements to the Solution

Westerlay continues to invest in BC to enhance its scalability for their organization. The organization recently upgraded from BC on-premise to the cloud, allowing them to stay current on updates as they are released without additional financial investment. Velosio is also working on migrating Westerlay from their custom BarTender integration to Velosio’s BarTender Integration solution.



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



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