



CLIENT SOLUTION CASE STUDY

Kidder Mathews Capitalizes on Productivity Solutions with Microsoft Dynamics from Velosio



MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

Background

Kidder Mathews is the largest independent commercial real estate firm on the West Coast. With over 900 local market specialists and top-producing professionals, Kidder Mathews has 20 offices in Washington, Oregon, California, Nevada, and Arizona. The expertise of each local office is reinforced by the relationships, intelligence, and experience of the entire firm. The firm has an annual transaction volume of over \$12B.



www.kidder.com

Growth and a Sunsetting System

When Kidder Mathews first approached Velosio, they had been using Microsoft Dynamics 365 SL solution on premises for over 20 years. Knowing that support for the SL solution was being discontinued, a new IT director made a goal to move to the cloud and new technology. A booming business, Kidder Mathews had 35,000 transactions in the system each month and over 600 sales transactions, making the SL solution slow and clunky. Kidder Mathews' Finance team wanted to see if a new Microsoft Dynamics 365 Business Central solution would be much improved feature-wise, and they were excited about what they saw in demos. They knew that a cloud-based solution would be able to handle multiple revenue streams including property management, asset services, brokerage, valuation services, and debt/equity.

“By moving to the cloud, we knew that we could be more efficient, and more automated, eliminating manual processes,” says Regina Golonka, senior corporate accounting & finance manager for Kidder Mathews. “SL took up a lot of server space,” adds Golonka.

OVERVIEW

Software Solutions:

- Dynamics 365 Business Central
- Progressus Project Accounting
- Microsoft Power BI
- Microsoft 365

Challenges:

- Legacy Microsoft Dynamics SL system
- Manual Processes and inefficiencies
- Disconnected Systems
- Insight Constraints

Benefits:

- Better Project Management
- Improved Efficiencies
- Streamlined Processes

Industry: Real Estate
Employees: 1,000
Headquarters: Seattle, Washington
Annual Revenue: \$464.2M

End-to-end Solution

Velosio presented an end-to-end solution to Kidder Mathews, including Microsoft Dynamics 365 Business Central (BC), Office 365, Power BI for reporting, and Progressus Project and Resource Management. The Kidder Mathews team liked what they saw, and determined Velosio was the right partner and Microsoft was the right solution for them.

Implementation and Training Highlights

During implementation, Velosio created process documents to review existing processes at Kidder Mathews and route them to new processes. This information was then used to develop user manuals and cheat sheets to empower users. For training, the focus was on training the trainer to further empower Kidder Mathews employees. All key users joined training sessions to ask questions and feel engaged and supported during the transition.

“Lucky for me, all of my users have been here less than two years, [except for] one team member who started in February and we implemented in April,” says Golonka. “Learning both SL and BC was difficult for him. For the rest of the team, you’re always going to have people used to one way. They expect BC to be the same,” continues Golonka. The combined Kidder Mathews and Velosio teams reminded users that it’s a new ERP system with best practices built in, and it won’t be the same as SL. “We transferred systems for it to be better, even though the concepts are the same,” adds Golonka.

Streamlined Processes

With the Microsoft Dynamics 365 BC end-to-end solution, processes were streamlined at Kidder Mathews, including:

Expenses

Kidder Mathews has agents who submit expenses such as parking, administrative charges, advertisement, company events, office supplies, and more, which need to be billed back to the parent company with the associated project code. These expenses are then converted to invoices from PN3 Paperless Purchasing & Payment Authorization Workflows, integrated to BC. Finance then charges customers and reimburses the agents out of BC based on these invoices and expenses. When agents used to submit expenses in SL, it took an hour to reconcile sales invoices. With BC and Progressus, it’s instant.

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- Regina Golonka

*Senior Corporate Accounting
& Finance Manager
Kidder Mathews*

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Data Import

For Kidder Mathews, Velosio imported three years' worth of data from SL to BC. All other historical information is housed in Azure. Popdock, a third-party solution, reads historical data without having it in BC, taking up space and costing money.

Preserving historical data to move it to a new system is usually the most complex and expensive part of data migration projects. Data is related, often dependent, and there are plenty of considerations including how much historical data it makes sense to move. Yet, every company needs some level of access to their old data when they're starting in a new system. Popdock gives Kidder Mathews the best of both worlds.

Microsoft Power BI

At Kidder Mathews, Power BI helps bridge the gap between data and decision-making. Velosio demonstrated APIs and links which allow Power BI users to pull in data. "We find Power BI easy to work with and pull tables," says Golonka.

Microsoft 365

Microsoft 365 allows the Kidder Mathews to boost productivity with Outlook, Word, Excel and more, with two-way integration between Microsoft 365 and BC/Progressus.

Microsoft Dynamics 365 Business Central with Progressus

"In SL there were so many reconciliations," says Golonka. "In the old billing system, once you sent it out you couldn't reprint or make changes - you could never go back, or your balance would be off. In BC and Progressus, that's not the case," adds Golonka.

Accounts Receivable and check request processes have improved. The check run would end about 3-4pm and now it ends at 1-2pm. "We are still improving [our processes] – we end up finding shortcuts that help all the time," says Golonka. "The system is user-friendly and reader-friendly," says Golonka.

Team Effort

Kidder Mathews comments on the team effort between their internal team and Velosio. "I worked wonderfully with Velosio - the whole team," says Golonka. "Seth, Mansoor, and McKay - I would email Mansoor at 6 p.m. and he's three hours ahead and he would respond which always surprised me. The response time was great, if I needed help, they were there. My team [was] amazed by the partnership. I had no issues with Velosio," continues Golonka.

Final Thoughts

When asked what advice she would give other companies transitioning from SL, Golonka was candid about the amount of preparation involved in the migration. "I relied a lot on Velosio. This was my first implementation, so we didn't have experience. Having Velosio guide us really helped. I learned a lot that I can use in future implementations. I have the experience now and I know what to do and what not to do. We have hiccups here and there, but we worked through it, it was never a panic mode. If I knew I was behind I would communicate and Velosio would understand it. We kept everything on budget. We were always informed where we were at. The ball was always in our court," concludes Golonka.

