



CLIENT SOLUTION CASE STUDY

Werk-Brau Automates Processes and Boosts Customer Service with Holistic Microsoft Dynamics 365 Business Central from Velosio



MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

Background

Since 1947, Werk-Brau has manufactured the highest quality and most innovative specialty products for the heavy equipment industry. Werk-Brau is respected internationally for providing outstanding customer service and dedication to excellence



in all aspects of its business. Duke Werkheiser and Dutch Brautigam, for whom the company is named, first opened their blacksmith shop in Findlay, Ohio. Today, Werk-Brau manufactures and produces parts and attachments in Findlay, Ohio, in a state-of-the-art facility.

Werk-Brau manufactures start to finish excavating and loader attachments as custom build projects for its clients. The customer base for Werk-Brau is approximately 70% dealer/distributor based, and 30% OEM. The 70% dealer base represents some 4,000 dealerships.

Challenging ERP

For several years, Werk-Brau utilized a manufacturing-based solution for Enterprise Resource Planning (ERP). The intent was to develop the solution to encompass a full-scale ERP platform with functionality in the cloud. "Our former solution was a good product, but we exceeded its capabilities," says Nate Heintzelman, director of operations for Werk-Brau. "The main driver to necessitate a change was the speed of the database. We needed a solution which moved more quickly to add efficiencies to our business. Additionally, we were having

OVERVIEW

Software Solutions:

- Microsoft Dynamics 365 Business Central
- Microsoft Dynamics 365 Sales
- Microsoft Power BI

Challenges:

- Manual Processes
- Disconnected Systems
- Insight Constraints

Benefits:

- Automated Processes
- Improved Efficiencies
- Real-time data visibility in end-to-end solution

Company Overview: Werk-Brau Co., Inc. manufactures a complete line of OEM parts and replacement attachments for large machines such as excavators, mini-excavators, backhoes, mini and full-size loaders, and crawler loaders.

Industry: Manufacturing
Employees: 300+
Headquarters: Findlay, OH
Annual Revenue: \$100M+

issues with the database daily, and it was a ticking time bomb for us. We needed to move to a more reliable system,” adds Heintzelman.

For Werk-Brau, the manufacturing solution provided good functionality with their focused manufacturing demand processes but fell short in the areas of cloud platform, finance, Salesforce integration, sales order processing, and more. The less powerful solution provided administrative challenges and overhead, as well as data loss because detailed entries were summarized to finance and general ledger, meaning transactional drill-down details were not available throughout the platform. Intercompany transactions were a challenge as well.

“We were not comfortable with the inventory values we were getting from our previous solution and felt that costing was greatly undervalued – this was a major concern for us,” adds Heintzelman.

Solution

Microsoft partner Velosio recommended that Werk-Brau implement Microsoft Dynamics 365 Business Central (BC), a comprehensive, cloud-based end-to-end solution. BC would have integration with Lanham Eship for shipping information and then a daily data file transfer to Werk-Brau’s 4PL company, Jarrett Logistics. There would also be a two-way integration between SigmaNest, Werk-Brau’s metal sheet cutting solution. This holistic approach would bring all Werk-Brau’s data and MRP functionality together into one seamless solution. Power BI dashboards and reports would keep everyone on the same page from a business planning perspective.

“When we first evaluated around 10 systems and selected the manufacturing-based ERP, BC was neck-and-neck with the other solution the whole time,” says Heintzelman. “After we outgrew the capabilities of the manufacturing solution, we decided to take another look at BC – we never considered another partner besides Velosio because of a longstanding relationship with them. Velosio was an easy choice for us,” adds Heintzelman.

Implementation and Training

At the time of implementation, Werk-Brau merged with its sister company, Fabco Co., to simplify operations. “The merger complicated our implementation at the outset, but paid massive dividends from a business structure standpoint, and ended up simplifying our BC solution

“

Our engineering team has 10 people who were spending 85% of their time managing bill of materials and item management - they now spend less than 10% of their time on that, which is a massive improvement.



- Nate Heintzelman
Director of Operations

”

in the end,” describes Heintzelman. “An ERP implementation is never fun, and it’s the hardest thing I’ve done in the 21 years that I’ve been with the company serving many different roles, but we ended up with the right team and worked through the complications together with Velosio,” says Heintzelman.

Heintzelman attributes implementation and training success to Microsoft familiarity and ease of use. “Our familiarity with Excel greatly simplified data upload to BC and data management. It was a game changer for us. Likewise for training – the familiar Microsoft experience makes it feel like you’ve been in the system before. User adoption has been high, and I attribute that to the familiar Microsoft look and feel,” adds Heintzelman. Werk-Brau rolled out train-the-trainer sessions, creating PowerPoint presentations with screen shots and how-to’s that users could later reference.

System Benefits

Werk-Brau has experienced major wins across its business by utilizing BC, especially for the Engineering, Sales, and Order Processing teams. “Our engineering team has 10 people who were spending 85% of their time managing bill of materials and item management – they now spend less than 10% of their time on that, which is a massive improvement,” says Heintzelman.

Additionally, where three people were processing orders, it now only takes one person, so Werk-Brau was able to reallocate one person and move another into a more proactive role. The Sales team has achieved a 25% improvement in productivity which they are now spending on more proactive calls and quote follow-up.

Werk-Brau has also experienced:

- Streamlined intercompany transactions and accounts payable
- Improved planning and procurement
- Robust MRP manages inventory demand
- Customer service -> operations process flow improved
- Less manual shuffling of project packets and CAD drawings for 75% improvement in productivity
- Simplified bill-to/sell-to/ship-to process
- Streamlined inventory management of over 60,000 items
- Improved data access for better inventory valuation and costing

“The speed to access data has greatly improved,” says Heintzelman. “The cloud gives us access from anywhere - on our phones, home computers, and across the world. It was the right decision for us to move to the cloud,” adds Heintzelman.



Customer Service and Sales

Werk-Brau strives to deliver the right high-quality product, at the right time. The customer service group is dedicated to helping manage this process through various updated date fields that drive the downstream process. This includes providing a manufacturing due date, with a promise not to go past one week outside of it.

BC solved many customer service challenges for Werk-Brau such as item availability at their fingertips and an accurate due date. “We now have better access to inventory availability, which we have utilized to ensure orders are delivered on time,” says Heintzelman. “Our on-time delivery has improved from 30% to 95%, but that was not all system related. It’s a combination of BC but also experiencing less challenges with the global supply chain post-pandemic,” adds Heintzelman.

In BC, there are quick and easy views for net item availability by location, and the ability to quickly see how much of any item is actively on:

- Component Lines
- Production Order
- Purchase Order
- Sales Order

To further extend client service capabilities, Werk-Brau recently kicked off a Phase 2 Microsoft Dynamics 365 Sales project to replace Salesforce. This new solution will allow users to:

- Assist customers from any location and using any device
- Use social analytics to expand the network and strengthen customer relationships
- Use configurable dashboards and data visualization software to gain actionable insights
- Create positive, customized customer interactions
- Build team collaboration

Go-live for Microsoft Dynamics 365 Sales is slated for Jan 15, 2024. Werk-Brau is also implementing Dynamics eShop, an eCommerce addition to the BC solution, to go-live at the end of the second quarter of 2024. “I’m very excited that it will give our customers and dealerships an ‘Amazon’ experience where they can obtain a quote, view open orders, search order history, and improve access overall,” says Heintzelman. “We are very happy with where we are at with the system and the potential to build upon it. Implementations are difficult, but Microsoft familiarity makes it easy to get over that hurdle,” concludes Heintzelman.

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

 888.725.2555

 insider@velosio.com

