

Socius Delivers Clean Solution For Neundorfer, Inc.



One such report, an order backlog report, took a day-and-a-half to produce. “We’d pull data from our accounting system, our manufacturing system, and our CRM system to get a complete picture of open orders, expected bookings, and cash expectations,” adds Ockuly.

A Big Breath of Relief

Neundorfer looked at other solutions before deciding on Microsoft Dynamics GP and Dynamics CRM. “We looked at updating our Sage MAS 90 software and we looked at upgrading to Sage MAS 500, adding Sage SalesLogix for CRM. Ultimately though, we decided that a Microsoft solution was the best choice for our organization. It offers a powerful, integrated ERP, project accounting,

Neundorfer, Inc. applies experience and knowledge to help customers enhance and optimize the performance of particulate collection equipment. “It is our passion to constantly improve our products and services for the benefit of our customers — providing solutions that reduce emissions and costs while improving efficiency and safety,” says Mike Neundorfer, President. The company’s long and complex manufacturing and sales processes operate efficiently with help from Microsoft Dynamics GP, Dynamics CRM, and Socius.

Ready for a Clean Sweep

Until recently, Neundorfer utilized Sage MAS 90 ERP with GoldMine to handle its ERP and CRM requirements and a third-party package for managing manufacturing. With three separate systems, gathering meaningful data was a struggle.

Jean Ockuly, Vice President of Finance for Neundorfer explains, “We were constantly looking for workarounds that would allow us to get the data we needed to run the business. We’d extract data from each package and re-enter it on spreadsheets to get the desired reports.”

CUSTOMER

Neundorfer, Inc.

INDUSTRY

Clean Technology

LOCATION

Willoughby, Ohio

Number of Employees

50

SYSTEM

Microsoft Dynamics GP
Microsoft Dynamics CRM

CHALLENGE

Lack of integration between financial, manufacturing, and sales software proved inefficient and costly.

SOLUTION

Microsoft Dynamics provides an integrated solution that meets all of Neundorfer’s requirements. Socius provided a business process review that set the course for efficiency.

RESULTS

Business intelligence data now is readily available and quick to retrieve. Integration across departments builds efficiency and improves quality. Best practices eliminate waste and save labor.

"Socius has been a true partner in the project, offering exceptional advice that helps us continually improve our operations."

manufacturing, and CRM solution, with a SQL database."

Socius proved instrumental in helping Neundorfer reach its decision. Representing both Sage and Microsoft solutions, Socius was able to help the company perform a deep comparison of each system and help determine which would best meet Neundorfer's needs. "They approached the project with a problem-solving mind-set, not a sales mind-set," says Ockuly. "We were confident that if they didn't think they had the right solution for us, they would tell us."

Business Process Review Adds Value

Neundorfer partnered with Socius to complete a comprehensive business process review. Socius worked with the staff at Neundorfer to identify current business processes and develop best practices going forward. "This was invaluable," says Ockuly. "By involving our entire team in the process, getting their feedback and buy-in, we were able to streamline many operations." As evidence of this, Ockuly points out that the company's weekly production meeting now takes just 20 minutes instead of the hour it used to consume. "Every week, each of the eight people in the meeting saves 40 minutes — that's a significant savings."

A Culture Of Confidence

The company's Microsoft Dynamics solution delivers integrated functionality from the manufacturing floor to the sales staff, from accounting to the field service representatives. Ockuly says she has new confidence in the data she receives. "We used to spend hours generating reports with data from disparate systems that were outdated before they were complete."

By utilizing the Microsoft SQL Server, Neundorfer no longer needs to spend up to 8 hours each week creating the company's most vital report. Now they can monitor cash flow, projections, total backlog, and other key performance indicators in real time.

A computer monitor hanging prominently in the Neundorfer facility streams current data from Microsoft Dynamics, including sales figures, production costs, and backlog volume, intended to keep employees aware of the dynamic business climate. "People constantly refer to it and work to boost sales and minimize costs as a result. It's a highly effective tool and resource," says Ockuly.

Ockuly witnessed a positive cultural shift since the conversion. "Across every department, our staff understands the value they add to the company and the importance of their positions and the work they do. They look for ways to improve our operations, and that leads to better quality for our customers," she says.

Optimize Sales Processes

Socius' business process review had a positive impact on the rollout of Microsoft Dynamics CRM. The sales cycle and workflow were defined, and requirements for each step were formalized. As a result, the software is delivering detailed metrics spanning CRM, ERP, and manufacturing data that Neundorfer can use to refine its sales cycle and better predict and schedule its production runs.

"Socius has been a true partner in the project, offering exceptional advice that helps us continually improve our operations," concludes Ockuly.



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