

# Microsoft Dynamics GP & CRM Facilities Maintenance

## CLIENT SUCCESS STORY

### Socius Delivers Business Efficiency Platform to Divisions Inc.

#### CUSTOMER

Divisions Inc.

#### INDUSTRY

Facilities Maintenance

#### LOCATION

Newport, KY

#### Number of Locations

Five

#### Number of Employees

90

#### SYSTEM

Microsoft Dynamics GP  
Microsoft Dynamics CRM

Divisions is an industry-leading facilities maintenance group offering a wide range of professional services. Its customers are primarily large retailers and national property management firms. The company has seen its revenue grow over 50 percent each year since its inception and its workforce triple in the past 18 months. Divisions credits much of its success in scaling operationally to support its growth to the Socius consulting team and Microsoft Dynamics CRM.

#### The Right Tool

The company has run its accounting and financial operations successfully using Microsoft Dynamics GP for several years, adding Microsoft Dynamics CRM two years ago. "We realized that while Dynamics GP did a fabulous job in our back office, we were missing a huge opportunity to collect information about our customer activities and interactions," explains Kyle Murray, Chief Information Officer for Divisions. "We were generating a huge volume of customer-related



information that had no home in the software. Understanding that you cannot manage what you cannot measure, we added Dynamics CRM to give us a comprehensive view of our customers and our operations."

A critical benefit of Dynamics CRM is its flexible and open database. "There is very little you cannot do in Microsoft Dynamics CRM," Murray adds. "There's virtually no business process it cannot address."

Divisions turned to Socius, its long-term business partner, for the implementation of Microsoft Dynamics CRM.

#### CHALLENGE

As a successful user of Microsoft Dynamics GP, Divisions found it lacked information about its customers and its operations.

#### SOLUTION

Socius implemented Microsoft Dynamics CRM, a tightly integrated and exceptionally flexible solution to complement its Microsoft Dynamics GP system.

#### RESULTS

Divisions saves thousands of hours on proposal generation annually. Expanding CRM capabilities into the accounts payable department drives efficiency and saves valuable time.

*"To say Dynamics CRM has paid for itself is an understatement. It has changed the way we do business. We've eliminated redundancy and the risk of errors and by doing so have enabled our employees to work more efficiently and effectively."*

### **Revamping The Proposal Process**

Proposals are at the center of Divisions' sales process. Before Dynamics CRM, proposal generation was a tedious task involving documents and spreadsheets. "The representatives had to manually enter all the customer address information on each document," recalls Murray. "They then would repeat almost the identical process for any service partners involved. It was redundant, inefficient, and left too much opportunity for error."

With guidance and assistance from Socius, Divisions created an entire proposal and contract management system within Dynamics CRM. An application wizard now walks sales representatives through the process of proposal generation. The representatives simply select the correct customer and vendor, choose from a list of services, and add notes and comments. The software calculates the correct pricing and then creates the proposals as a PDF ready to send to both the customer and the vendor via e-mail. "CRM initiates a workflow that routes the proposals to our contracts department for approval. Once approved, it is added as a contract in Dynamics GP," explains Murray.

Further time savings comes from having the software automatically generate the contracts' invoices and purchase orders.

### **Generous Return On Investment**

"The efficiency gains are enormous," says Murray. "We produce several thousand proposals every year. Before, the process involved in generating each new proposal and subsequent contract consumed an hour and a half of employee time. Now it takes 10 minutes. We are literally saving thousands of hours annually. We've

eliminated the need to hire additional administrative staff to keep up with the workload."

Now the company is able to monitor and report upon its pipeline. "We know how many proposals are out and in what they are worth" explains Murray. "It keeps our representatives more accountable for their territories, and it allows us to see where we are winning and where we can do better. We now can measure it, so we can better manage it—precisely what we wanted to accomplish."

### **A Business Efficiency Tool**

Dynamics CRM also is increasing efficiency in Divisions' accounts payable department. Previously, invoices with a problem, such as a missing purchase order number, were set aside for staff to research. Seeing an opportunity for technology to streamline this process, Divisions turned again to Dynamics CRM. Now, every incoming invoice is first logged into the CRM software with any issues noted, and an automated e-mail can be sent to the vendor detailing the problem. As an invoice is paid, Dynamics CRM is updated with the status, enabling any of the company's staff to quickly respond to vendor inquiries. Once complete, invoices route directly to the billing department where an accounts payable invoice is created. "Streamlining this process saved us time and money," Murray says. "Using Dynamics CRM, we created an efficient solution to a troubling business problem."

Murray concludes, "Socius is a valuable resource to us. We are savvy users and are able to do much of the customization ourselves, but it is still great to have their expertise when we need it. They are our go-to firm."

# SOCIUS

The Power of Partnership

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#### **Columbus**

7003 Post Road, Suite 300  
Dublin, OH 43016

800.589.6614  
www.socius1.com

#### **Cincinnati**

3805 Edwards Road, Suite 420  
Cincinnati, OH 45209

#### **Cleveland**

6800 W. Snowville Rd., Suite 200  
Brecksville, OH 44141

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