



Microsoft Dynamics GP Customer Solution Case Study



Overview

Location: Ponte Vedra, FL

Industry: Retirement Communities
Management

The Challenge

New Great Plains users who were frustrated with unexplained "quirks" in the program, a staff struggling with workflow and a lack of assistance from their Microsoft Partner.

The Solution

An overview meeting to discuss every module owned, what each one did and whether or not it was needed. Then a "Great Plains Work Plan" was developed and implemented.

The Results

LCPS Management now has a new Microsoft Partner, a productive and efficient staff who utilize a Great Plains software solution which meets all of their needs.



Successful Solutions. Delivered.

LCPS Management, Inc. and Integrated Business Group, Inc.

I came to LCPS Management, Inc. as Controller in April 2010. Being new to Great Plains, as I began to see unexplained quirks in the program, I tried to chalk it up to just being a new program. However, as I spent the next year watching processes, seeing my staff struggle with workflow, the continuous frustration with Great Plains, and the total lack of assistance from our "partner", I decided to make a change. On-line research led me to [Integrated Business Group](#). The immediate benefit, in my mind, was proximity. Their offices in Altamonte Springs are an easy 2-hour drive for me; making training rather convenient. I called, explained some of my concerns, and then asked for an appointment with someone who could work with me.

In April 2011, Brian Caslow, President of IBG, came to my office; we spent several hours discussing my concerns with GP. We discussed every module we owned at the time (Payroll, A/P, General Ledger, Fixed Assets, InterCompany Postings), and what in each module did work and what didn't work for us. I came out of this meeting with a "[Great Plains](#) Work Plan", which Brian helped me develop and prioritize. This plan was intended to be a 1-2 year ongoing project, including in-depth audits of every module, every work process, and provide suggestions to either change setup of GP, modify our work process, or perhaps even purchase additional software to tag-team with GP.

IBG has a team of individuals who work with me, each with their own areas of expertise. When it was time to audit the setups of our 3 payroll companies, Jackie Smith was key. She came to us, spent hours listening to both the payroll and the HR staff, then began to review the setups within the program. Subsequently, she came to us with a series of recommendations; explained each one, pros and cons, and we (as a team) decided what would work best for us. Jackie then made the changes to our database so our 3 companies are set up much more similarly, making work processes easier.

“IBG has a team of individuals who work with me, each with their own areas of expertise.”

—Candy Bowling, Dir. Of Financial Services
LCPS Management, Inc.

More Information

Integrated Business Group, a Microsoft Partner, has achieved a Silver Enterprise Resource Planning Competency & Learning Competency, a worldwide recognition for commitment to providing comprehensive training solutions for Microsoft technologies—strengthening IBG’s standing in the marketplace and enabling IBG to reach more customers.

For more information about Integrated Business Group products and services, please call (407) 677-0370 or visit the Web site at: www.ibgnet.com

For more information about LCPS Management, Inc., call (904) 201-7003 or visit their Web site at: <http://lcpsmgt.com/index.html>



Microsoft Partner

Silver Enterprise Resource Planning
Silver Learning

We had been paying for the Fixed Assets module for several years but didn’t know how to pull any reports to satisfy our auditor. Jackie came to us, spent ½ day with my bookkeeper and myself, and taught us how to use the Smartlist tool to create some reports that the auditor now raves over. She could have just written the reports, but we gained some knowledge so we can now do some modifications on our own.

Within the past month, in the middle of transitioning to a new role, I was tasked with reviewing the entire Fixed Assets database and shortening the lives of every asset possible to accelerate depreciation; and to do this before I closed the year (Dec 31). I called Jackie, explained the project; we spent about an hour on the phone working out options, then she went to work. We exchanged a few emails; I had to sign off on her suggestions; she wrote SQL reports to prevent me from having to spend 30-40 hours doing data entry. Project completed, and my Board is pleased.

Our company has been using FRx on top of GP to create Financial Statements; I came here with a prior knowledge of this software. FRx, however, is becoming obsolete. GP has a management Reporter module that will replace it; IBG has personnel who are knowledgeable in this module. My FRx reports were all migrated into the new software, I’ve spent one hour on a [Go-To-Assist](#) session learning my way around, and will participate in more training as soon as my schedule allows.

One of the trainers, Sarah Redmond, has been on site for me numerous times as well. This method works much better for my team; we are all together, looking at our setup and data rather than a fictitious scenario, and can flex our pace as we see fit. My HR Director is still lobbying for outsourcing payroll, so I have engaged Sarah to come back, spend an entire day with this individual, audit processes, and make recommendations. I will NOT go back to outsourcing, but will do what is possible to accommodate this individual’s frustrations.

Chris Caslow, (I believe) Lead Programmer, is quick to respond to requests. Some of our reports are written in SQL, we don’t have capability to work with this software, so Chris has been called on to help us. I’ve lost Posting Batches; Chris has never been unsuccessful in retrieving my work.

Ron Ullyot, (I believe) Sales Manager, has been extremely helpful in finding products that meet a need I have, even non-GP products. We’re currently transitioning our Timekeeping system to a product that Ron has led us to. He has recommended a few products to me that I want to look into as soon as time allows.

Sarah and Jackie both are accountants who have worked in organizations, facing the same time-deadlines and issues I face daily.

They speak the same language I do. This makes working with them so much easier, knowing they understand what is behind my request or question. Sarah spends more time in the field training, and usually responds to an email within 24 hours. Jackie, on the other hand, is much more flexible. I have Jackie's home and cell numbers, and have called her after hours and on weekends. Working on W-2's on a Saturday, we ran into a snag, and I called Jackie. Within 30 minutes, an issue that could have stopped us for the day was resolved, and we successfully completed the task.

LCPS Management exists for the sole purpose of managing 2 Continuing Care Retirement Communities – Vicars Landing in Ponte Vedra Beach and Glenmoor in World Golf Village. All 3 of these organizations are not-for-profit corporations, committed to the quality care of seniors. The only source of money is our Residents, and we are always mindful of that in our spending decisions. My job is to protect the assets of these organizations, not freely spending money. However, I have NEVER regretted one single penny I have spent with IBG. They are committed to helping my staff be more productive and efficient, having GP work for us rather than the other way around, and I have never felt I was unfairly billed. I have never felt I pressured to buy a product, or pay for services, unless I first initiated the conversation. In my mind, this is a cost of doing business, just like my Microsoft licensing fees and IT contractors.

Please feel free to contact me if you have further questions. I enjoy bragging about my partners.

Candy Bowling
Director of Financial Services
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