



Case Study

Increasing Operational Efficiency with an Integrated Microsoft Dynamics Solution

Client Quote

“The Revere Group’s commitment and level of excellence has elevated the quality level of our business operations.” – Chief Financial Officer



CLIENT

The client is a leading Midwest provider of financial and real estate resources for not-for-profit organizations. They provide mortgage loans and specialized real estate development services that help build stronger not-for-profits which serve low-income communities.

EXECUTIVE SUMMARY

The client’s existing applications included custom developed loan servicing software, not-for-profit accounting software, an internet based time and expense entry application, and spreadsheet based project billing. They desired an integrated solution that would provide operational efficiencies with the ability to provide a holistic view of leads, opportunities, loans and projects. The Revere Group designed, developed and implemented a solution that integrated a new off-the-shelf, industry-specific loan application, Dynamics GP, Dynamics CRM, and an add-on to Dynamics GP called, WennSoft that handled the time and expense entry and invoicing needs.

BUSINESS CHALLENGE

The client needed to replace an aging set of applications and manual processes that were hampering overall business and operational efficiencies. This caused significant amounts of double keying and an inability to have a comprehensive view of the business. Additionally, the two main business lines (loans and projects) had significantly different needs and were both expanding. These business drivers, coupled with a limited budget, led the client to choose a quick implementation of the basic modules, with the expectation of a full integration into their legacy systems and processes. The client then sought review for an additional assessment based on their business requirements. The Revere Group proposed an approach called – Solution Design. This approach determines, up front, how an integrated, holistic applications solution would meet the business needs and work together.

SOLUTION

The initial approach began with a solution definition. From this fact finding exercise we learned what the organization’s business goals were and then developed business requirements that would accomplish those goals. From those business requirements, The Revere Group defined an application solution set that covered all aspects of their business from prospecting to opportunities

to loans, to projects. It allowed for business line and geographic growth.

The overall solution that was defined included a best in class commercial loan application that could be used to handle current and other types of commercial loans. Wennsoft was included to handle the client’s project based time and expense entry, project accounting and invoicing needs. Dynamics GP was selected to be the accounting backbone of the solution. The Analytical Accounting and Grant Management modules were included to provide information needed regarding their grant portfolio. Dynamics CRM would provide lead, opportunity and grant reporting capabilities. This comprehensive solution design was matched against the business needs and provided key stakeholders in the organization with a roadmap of how the solution would meet the current and future business needs.

RESULTS

The client is able to enter information in one location with minimal reentry. A reporting engine will be created to operate the business with a dashboard-based operation where reports and graphs can span any operating entities, including business operations or geography.

The client has been able to automate many of the manual processes, which decreased data entry timeframes and eliminated errors. Additionally they are able to quickly and easily view operational and financial data which originally required days to prepare. Systems are linked together creating a seamless flow of business intelligence and there is now a single source of data for each area of the organization.

The CFO stated, “The Revere Group’s commitment and level of excellence has elevated the quality level of our business operations. They worked with our organization to explicitly understand our needs and to gain in depth working knowledge about our industry. They addressed our overall business issues including our immediate technical requirements for current and future growth. The Revere Group had the ability to assess all of our applications, and integrate them seamlessly onto one efficient, modern platform. I feel confident knowing our technology investments meet our needs, are integrated correctly, and will help us grow and prosper for years to come.”



The Revere Group, an NTT Data Company, is a business consulting & IT solutions firm dedicated to accelerating growth, improving profitability and driving performance for our clients.

Related Microsoft Services

Strategic Services

- BPR/Process Management
- Hosting/Managed Services
- KPI/Roadmap
- End User Adoption
- Interactive Services
- Infrastructure and Unified Communications

Microsoft Technology

- Dynamics GP
- Dynamics CRM
- BizTalk Server
- Commerce Server
- SQL Server, SSRS, SSAS, SSIS
- Performance Point Server
- SharePoint Server/MOSS
- Silverlight
- Exchange Server

Revere has earned top status as a Microsoft Gold Certified Partner – a designation reserved for Microsoft business partners who earn the highest customer



endorsement by completing extensive training to meet Microsoft certification standards.

About The Revere Group

The Revere Group is a leading global consultancy dedicated to delivering business and IT solutions.

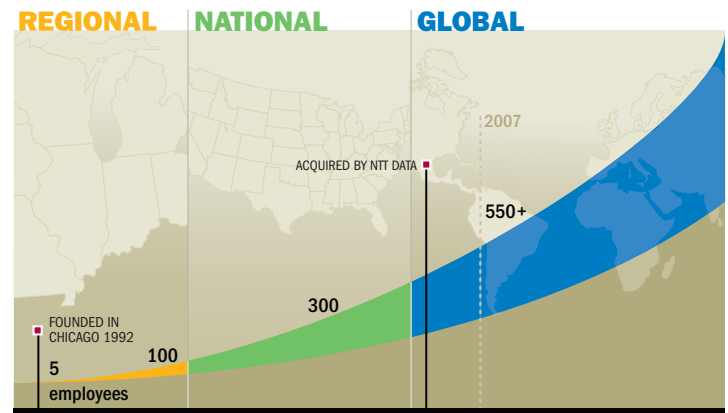


As your trusted advisor, we provide industry, process and technology expertise with a proven service approach – Think, Build, Source – to pave the way for your success.

THINK Companies continually face the challenge of aligning their business objectives with their IT strategy. An effective roadmap with a strong business case delivers a path to achievable goals with measurable results. The Revere Group helps identify and link people, process and technology, bringing clarity to your business and IT initiatives.

BUILD A successful implementation is the driving force behind all that we do. We deliver the right solution on time and within budget. Our disciplined project management and business aptitude ensures the success you rely on.

SOURCE The right balance of sourced functions can improve your IT service levels and return on investment, allowing you to more effectively meet your business needs. The Revere Group helps identify a strategic sourcing model based on internal capabilities, external resources and cost.



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