

Case study

Digital Transformation Services Enable a Building Materials Product Manufacturer to Save Over 60% Operational Costs



Customer Overview

Customer:

A building materials product manufacturer

Profile:

The client is a leading manufacturer and marketer of windows, doors, sunrooms, roofing, and siding products for home and corporate improvement projects.

Industry:

Manufacturing and Distribution

Services:

Digital Transformation - Dynamics 365 (ERP and CRM), Power Platform, Microsoft 365, Azure Services

Business Need

A leading provider of custom-designed and custom-manufactured home improvement solutions, the manufacturer faced challenges on account of using several legacy systems – including 52 sales and marketing systems, 52 accounting systems, 2 different manufacturing systems and countless excel sheets – to manage various business processes. Poor integration between these systems led to limited visibility and forced users to invest a lot time and effort in operating them.

At the same time, heavy reliance on manual, paper-based processes to manage marketing, sales, and service activities made it difficult to record, organize, and consolidate information related to prospects and customers. This led to problems such as data inconsistencies, operational inefficiencies, and difficulties in analyzing customer interactions. Working in a highly competitive business environment, the manufacturer was also facing challenges in predicting location-wise sales forecast due to the dependence on siloed tools such as Microsoft Excel and Access, which failed to completely capture the variation in business, resulting in planning difficulties.

The existing set of legacy systems led to several challenges with respect to enterprise decision-making and analytics. There was a technical and business need to come up with a integrated platform for LOB systems including ERP, CRM, SharePoint, Power BI, and PowerApps. With the tech ecosystem missing an integrated technology platform for digital transformation, the client faced poor real-time data availability.

The manufacturer needed to automate business processes, handling everything from marketing to service, and introduce an easy-to-use location-wise sales forecasting system for accurate forecasting. They also needed a consolidated approach to manage their financial, inventory-tracking, manufacturing processes, and integrate new ERP functional modules to better manage projects, resources, production, inventory, finances, and customers.

To enhance productivity and efficiency, the manufacturer also wanted to integrate productivity and analytics tools such as Microsoft Power BI, Power Apps, and SharePoint Online and improve their decision-making ability.

Solution and Approach

To help the manufacturer gain deeper insight into the business, Synoptek worked closely to provide a range of Managed Tech and Digital Transformation Services across Implementation, Upgrade, and Support using the Synoptek Platform.

Envision



Develop a future blueprint to meet larger business goals

- Financial System Consolidation
- ERP Upgradation
- Customer Engagement and Appointment Scheduling
- Salesforce Optimization
- Manufacturing and Inventory Integration to Financials
- Security Strategy Development
- Data Migration Strategy Development
- Document Management

Transform



Harness the full power of your enterprise ecosystem to accelerate growth

- Technology Implementation
- Business Process Study
- Global Design
- Machines and Product Configurator integration
- Knowledge Management
- Best-in-Breed Training and Testing Plan
- Data Migration and Management
- System Rollouts
- Data Analytics

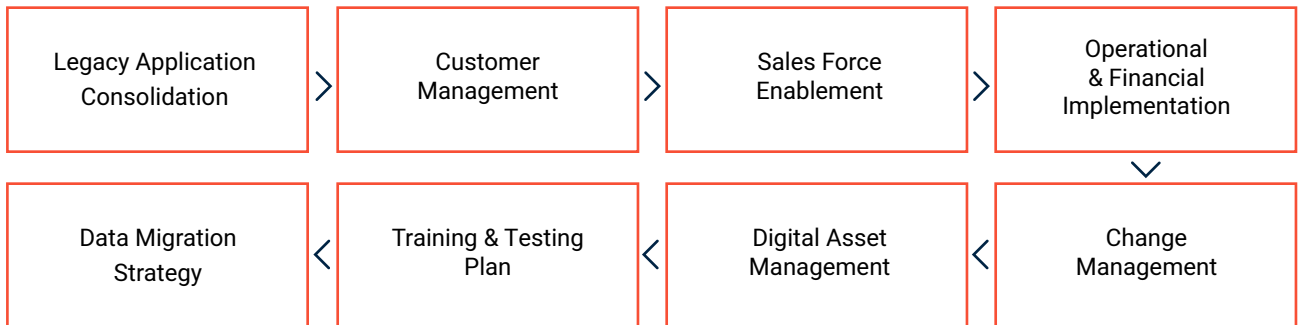
Evolve



Leverage structured processes for ongoing business and technology evolution

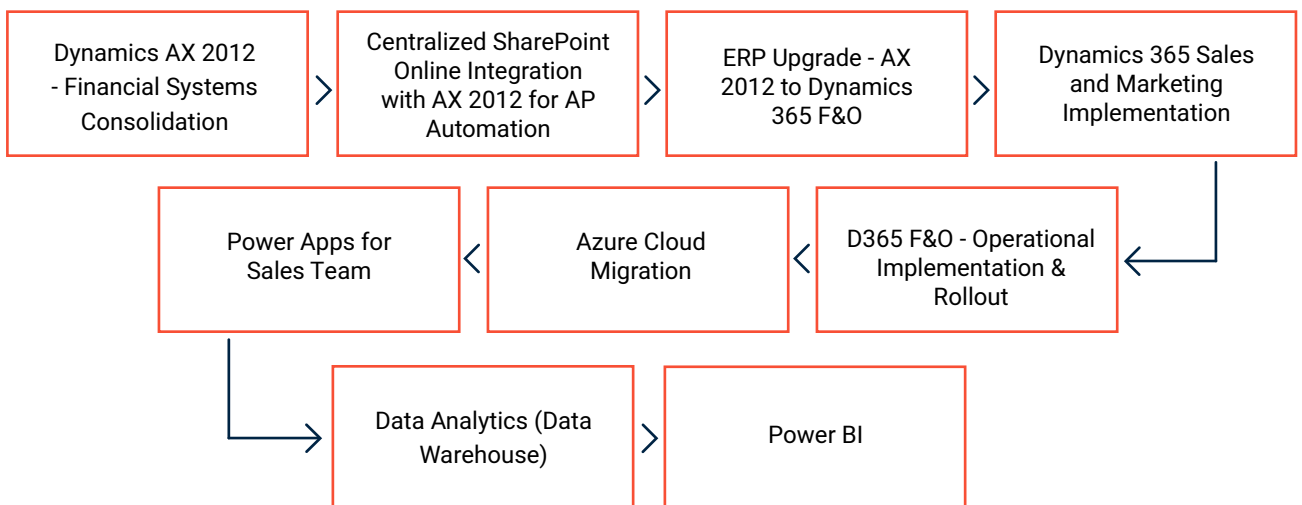
- SLA Optimization
- Process Improvization
- New Entities Extension
- Financial Consolidation

Through detailed discovery, below are the business areas covered as part of the roadmap.



Synoptek also helped in building their overall TCO and ROI and strengthening their internal team. Once all the KRAs and components were defined, we came up with a timeline and different phases under which we will be implementing the technologies.

Technology Projects Delivered as Part of Roadmap:



Financial Systems Consolidation

- Consolidated financial data from different retail affiliates while enabling customization of business processes

SharePoint Online Integration

- Integrated the AX 2012 R3 and D365 F&O system with other business systems such as:
 - SharePoint Online with D365 F&O and AX 2012

ERP Upgrade

- Utilized Microsoft's FastTrack to upgrade the existing AX 2012 R3 system to Dynamics 365 Finance and Operations including installation, custom code upgrade and data migration and implemented a few modules
- Implemented Manufacturing Operations to enable real-time inventory status, real-time inventory costing, and automation of WMS and shopfloor pick, pack, and RAF capabilities

Dynamics 365 Sales and Marketing Implementation

- Developed an easy-to-use, mobile-ready business management portal using Dynamics Customer Engagement
- Enabled integration with their standalone website, 56 retail affiliates, Dynamics AX system, Zapier, WTS Paradigm Drafting and Blueprint Service, RFID technology as well as with Power BI

D365 F&O - Operational Implementation & Rollout

- Upgrade to D365 F&O
- Door Business Unit rollout Manufacturing
- Affiliate Receipt automation

Azure Cloud Migration and Cost Optimization

- Migrated their on-premises data center to Azure cloud
- Reviewed the current Azure environment and suggested the use of reserve instances to optimize monthly spend on Azure resources
- Took steps to optimize Azure expenditure, increase efficiency, and improve ROI from the cloud

PowerApps Implementation

- Developed apps, workflows, and web jobs such as Custom Data Application and Lead Generation Application
- Enabled the Export to Excel function for managers to export all of the leads/appointments in an Excel spreadsheet
- Enabled PowerApps enhancements, extended integration capabilities, and enabled better utilization of resources

Data Analytics

- Identified a mechanism to fetch data from D365 FO to data warehouse and make required changes in existing reporting procedures
- Enabled automatic sync of data from D365 to Azure SQL on defined frequency

Power BI

- Developed and modified existing dynamic ETL framework to incrementally sync data from Azure SQL BYOD database to the data warehouse on a daily basis
- Developed an efficient and cost-effective location-wise sales forecasting tool to create accurate and credible forecasts

Business Results

The manufacturer has been a valuable client for Synoptek since 2015. With the range of services provided by us, the manufacturer has been able to eliminate reliance on disparate and unintegrated legacy systems, standardize processes, integrate the business, and improve visibility. Today, the company is able to efficiently convert opportunities into orders and streamline administrative tasks and achieve a number of benefits:

- Standardize processes and seamlessly operate across various locations while complying with necessary regulatory requirements
- Unify manufacturing process across different business units and achieve real-time insight to increase both production efficiency and profitability
- Achieve a 360-degree view of customers via AX-CRM implementation and enable evidence-based decision-making via AX-Power BI integration
- Automate the sales processes with Dynamics 365 Customer Engagement and improve operational efficiency and business productivity
- Make the most of a comprehensive marketing, sales, and service management tool to improve business strategies, strengthen customer relationships, and transform data into actionable results
- Achieve better cost control and accurate inventory valuation via deeper integration between key functional processes
- Enhance the efficiency of financial operations and enable strategic planning activities such as cash flow management, accounting, forecasting, budgeting, and financial reporting and analysis
- Define accurate budget amounts and track budget to actuals as well as forecasts to actuals



Resolve system issues with an SLA of **99.9%**



Enjoy **350K** annual savings in Azure expenditure by utilizing reserved instances



Increase top-line revenue by **20%**



Achieve a **30%** increase in sales orders



Optimize inventory by **15%**

Overall, Synoptek has helped the manufacturer save between 60 and 75% of operational costs they were spending before, reduce inventory by 20 to 30 percent, and bring down the closing process duration from a month to five days.

“ Synoptek led us to complete our journey to D365 with an upgrade from the on-premise version of Dynamics AX to the D365 Finance and Operations (F&O) platform. The effort took a little more than six months, delayed in part by shifting business priorities brought about by the COVID pandemic. However, Synoptek was able to adapt to our schedule changes and conduct a flawless cutover that resulted in no disruption whatsoever to our business operations. The end result is a fully-integrated cloud-based CRM/ERP solution that brings efficiencies to our business operations and provides a scalable and powerful platform for our continued growth.

D365 cloud now helps us save costs associated with hosting the on-premises system and allows us to focus on curating valuable solutions for our business. We look forward to continuing our partnership with Synoptek as we now leverage D365 to serve our customers more effectively.”

- Dave Hofmeister
Vice President, Information Technology

About Synoptek

Synoptek delivers accelerated business results through advisory led transformative systems integration and managed services. We partner with organizations worldwide to help them navigate the ever-changing business and technology landscape, build solid foundations for their business, and achieve their business goals.