

Case Study

Synoptek Helped a Leading Building Materials Manufacturer Cut Operational Costs by Over 60%



Customer Overview

Customer

A leading building materials 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

Application Modernization and Managed Services

Business Need

The client is a leading provider of environmental, industrial, and emergency response services to utilities, municipalities, and industrial companies across the U.S. With operations spanning multiple states and rapid business growth through acquisitions, the organization found itself constrained by a patchwork of legacy systems and manual workflows.

The client's IT ecosystem was highly fragmented:

- 56 different instances of Sage ERP
- Incomplete AX 2012 implementation hosted on Watserv Data Center
- Multiple disconnected applications and Excel-based tools used for managing daily operations
- Absence of a centralized Sales Enablement platform

This lack of system integration created significant issues:

- Time-consuming manual processes across marketing, sales, service, and finance
- Complex and resource-intensive financial consolidation, taking 3–4 weeks of finance team effort
- Poor visibility into business performance and limited customer insight
- Disconnected systems made appointment scheduling and vendor reconciliation inefficient

- Decentralized Accounts Payable process, resulting in delayed vendor reconciliation and limited control over spend
- Inability to perform accurate, location-wise sales forecasting and project tracking due to siloed data

Despite a strong market position, their enterprise resource planning (ERP), financials, and operational workflows were fragmented, leading to inefficiencies, limited visibility, and increasing administrative overhead. The lack of an integrated system made it difficult to scale operations efficiently or support future growth. The company's legacy technology had become a bottleneck, preventing growth and draining productivity.

Synoptek's Solution: A Phased Business Apps Modernization Strategy

To address the complexity of the client's operational sprawl, Synoptek deployed a three-phase modernization framework—Envision, Transform, and Evolve—with Microsoft Business Applications at its core.

Phase 1: Envision – Creating a Strategic Blueprint

Synoptek began with a thorough discovery process to:

- Assess current situation and identify immediate needs
- Build a strategy to implement CE Sales and Marketing, as well as an integrated and automated strategy for Appointment Handling
- Consolidate disparate financial systems across affiliates
- Map operational pain points and automation opportunities
- Develop a global design for ERP, CRM, and Power Platform integration
- Define a phased roadmap for ERP modernization, system decommissioning, and user adoption
- Lay the foundation for a cloud-first, scalable solution architecture

Key Deliverables:

- Financial and manufacturing process alignment
- Integration strategy for SharePoint Online, Power BI, and Power Apps
- A robust data migration and security governance plan

Phase 2: Transform – Implementing the New Digital Core

This phase involved implementing the foundational systems that would drive long-term scalability and operational agility.

ERP Modernization

- Used Microsoft FastTrack to upgrade from AX 2012 R3 to Dynamics 365 Finance & Operations
- Consolidated financial data from multiple entities
- Enabled real-time inventory tracking, costing, and shop floor automation
- Rolled out operational features including WMS, pick/pack, and production controls

CRM + Customer Engagement

- Deployed Dynamics 365 Sales & Marketing with mobile-friendly portals
- Integrated 56 retail affiliates, multiple websites, and tools like Zapier and WTS Paradigm
- Unified customer profiles, appointments, and lead pipelines in one centralized view

Cloud & Platform Integration

- Migrated on-prem workloads to decision-making
- Enabled automated data sync to Azure SQL and the data warehouse
- Replaced error-prone manual forecasting with a location-wise predictive model

Phase 3: Evolve – Operational Rollouts and Optimization

With the platform in place, Synoptek helped the client roll out a unified manufacturing process for new entities as part of the M&A:

- Automated project costing and financial rollups
- Unified manufacturing and inventory processes across 400 sales centers and stores
- Enabled cash flow management, budget forecasting, and strategic planning
- Delivered Power BI-backed reporting for real-time analytics across production, finance, and sales
- Supported new business integrations using templates and shared service models

Business Outcomes Achieved

With Synoptek's guidance, the client transitioned from a fragmented legacy environment to a fully integrated cloud-based ERP/CRM platform, resulting in significant efficiency gains and business value.

Quantifiable Results

- 60–75% reduction in operational costs
- 20–30% reduction in inventory holding
- Cut the month-end closing time from 30 days to just 5 days
- 30% increase in sales order processing efficiency
- \$350K+ annual savings in Azure spend through optimization
- 99.9% SLA adherence on resolving system issues

Strategic Benefits

- Unified business processes across 56 retail affiliates
- Standardized workflows across sales, marketing, manufacturing, and finance
- Enhanced decision-making with integrated Power BI dashboards
- Automated budgeting, cost tracking, and customer communications
- 360° customer view with D365 and CRM integration
- Faster integration of new business units via global design templates

What the Client Said



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. Despite delays caused by shifting priorities during the COVID pandemic, they conducted a flawless cutover that resulted in no disruption to business operations.

– **Dave Hofmeister, VP of Information Technology**



The 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 leverage D365 to serve our customers more effectively.

About Synoptek

Synoptek delivers accelerated business results through advisory-led, transformative full-life-cycle 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.