



CASE STUDY:

Queue Associates Executes Global Microsoft Dynamics SL Migration and Integration



Company: ORC International
Country or Region: Global
Industry: Business Services

Company Profile

ORC International, a global leader in business intelligence, with offices in the US, UK, Australia, Hong Kong, Singapore and China, provides integrated research solutions to optimize performance in Customer and Employee Relations, Marketing and Strategy.

Business Situation

ORC was challenged with harmonizing their internal business systems. US, UK, and Australia had separate Enterprise Resource Planning (ERP) solutions which limited ORC's ability to globally leverage its own data for strategic decision making and business expansion.

Solution

Microsoft Partner, Queue Associates deployed a worldwide rollout of Dynamics SL that would allow for integration of back office functions across the three regions.

Benefits

- Consolidated financial information
- Single portal access
- Dashboards depicting KPIs and project profitability

“With this system, we are becoming a best practice for our own new divisions and acquisitions. Dynamics SL supports our company and its project management focus very well...”

- Stacy Lee, ORC International

When ORC International, a global leader in delivering business intelligence and data analysis to clients worldwide discovered that their own use of disparate financial systems limited their ability to leverage their own financial data for strategic business decisions and further expansion, they called Queue Associates to strategize, architect, implement and support a global rollout of Microsoft Dynamics SL that consolidated their financial information across their English speaking offices and effectively replaced both Agresso and Quickbooks solutions.



“In the US and UK we were using Agresso, and in Australia were using QuickBooks solutions. Kooyman recognized that to operate like a global company, it was time for all regions to be on the same business systems, follow the same key business processes and have unified definitions for margins and profitability” - Stacy Lee, ORC International

“Because Queue had similar experiences in providing Microsoft ERP and CRM solutions for international organizations that are multi-company and multi-currency enabled, and has very good customer service, we were quite comfortable with the decision to go with Queue” - Stacy Lee, ORC International

Business Intelligence at its Best

ORC International, a global leader in business intelligence, with offices in the US, UK, Australia, Hong Kong, Singapore and China, provides integrated research solutions to optimize performance in Customer and Employee Relations, Marketing and Strategy. ORC combines quality data, smart synthesis, and a best in class digital platform to deliver transformative business insights clients leverage for dramatic growth.

Building a Globally Connected and Customized ERP

Among its areas of expertise, ORC delivers expert integrated data synthesis. Until recently ORC had its own challenges in harmonizing their internal business systems. US, UK, and Australia had separate Enterprise Resource Planning (ERP) solutions which had limited ORC’s ability to globally leverage its own data for strategic decision making and business expansion. ORC’s current CEO Simon Kooyman took the reins in 2012 and quickly set about to implement his vision of a matrix organization. “We may have used the same term “gross margin” but it was defined differently depending on the region or the systems that were used” explained ORC CFO Stacy Lee. “In the US and UK we were using Agresso, and in Australia were using QuickBooks solutions.

Kooyman recognized that to operate like a global company, it was time for all regions to be on the same business systems, follow the same key business processes and have unified definitions for margins and profitability”

Under Kooyman’s and Lee’s leadership, ORC set out to migrate to a new, single, worldwide ERP solution that would allow for integration of back office functions across the three regions. An ambitious undertaking for any organization, the project presented especially high stakes for a market leader like ORC for whom typical migration pitfalls like downtime, data loss, and missed deadlines were simply not an option.

Microsoft Dynamics SL and Queue Associates

After careful research of ERP solutions and thorough vetting of Microsoft solution providers, Kooyman and Lee decided to move forward with Queue Associates, an award winning Microsoft Gold ERP Partner. “Because Queue had similar experiences in providing Microsoft ERP and CRM solutions for international organizations that are multi-company and multi-currency enabled, and has very good customer service, we were quite comfortable with the decision to go with Queue,” Lee explained.

“We are particularly impressed with Queue’s project management expertise, flexibility and ability to listen to customer’s needs. By working closely together with Jeff’s team, we were able to complete the entire implementation for the US/UK phase within a six month time frame.” - Stacy Lee, ORC International

The Solution

After carefully assessing the timelines, culture, and business processes, Lee architected a two-phase implementation approach for ORC’s installation of Microsoft Dynamics SL with Queue’s Managing Director Jeffrey Goldstein. Queue began by migrating the US and UK offices onto the Microsoft Dynamics platform. From the design to go-live and even with the sophistication of the US businesses due to various acquisitions, the entire project took only six months to go-live. Some of the custom functionalities implemented included:

Consolidated Financial Information –

Queue used Standardized Bus Process procedures and controls to provide this highly useful data.

Single Portal Access – In order to best process and leverage business intelligence, Queue created centralized access to business processes and accurate financial data across several offices.

Dashboards depicting KPIs and project profitability—Queue made the ability to monitor and review clear and easy to help ORC better manage their business.

Twelve months later, ORC teamed up with Goldstein and his team and migrated the Australia offices onto the same Microsoft Dynamics platform.

ORC is pleased with the overall project. “We are particularly impressed with Queue’s project management expertise, flexibility and ability to listen to customer’s needs. By working closely together with Jeff’s team, we were able to complete the entire implementation for the US/UK phase within a six month time frame.

Australia comprised the second phase, and we effectively leveraged experience from phase one to deliver on time and under budget when executing phase two. Throughout the process, Queue was actively monitoring the project progress and provided necessary technical expertise and support whenever we needed it. The Australia project was completed almost entirely remotely using tools like Microsoft Lync for weekly calls and training. Queue was able to implement solutions for localizations—like the Australian VAT tax—without compromising data centralization and accuracy. In addition, the ORC and Queue project management team only traveled to Australia to bring the system live. Because of this efficiency and conservation of resources, phase two came in on time and under budget. From start to completion, both phases took less than ten months.”

“We are happy with our partnership with Jeffrey Goldstein and Queue Associates,” stated Lee. “Their team is easy to work with and have a strong project management expertise. And if the road gets rocky, they will listen to and address customers’ concerns on a timely basis. “The partnership relationship is what I value the most”
- Stacy Lee, ORC International

Immediate ROI

To date, ORC has experienced significant benefits from their Microsoft Dynamics SL implementation. These include: **Strategic business intelligence.**

Lee and her team now enjoy great visibility of revenue sources. They can drill down by region or business units, and also have access to an online reporting tool that makes data easily accessible at any time from any location.

Increased speed and accuracy.

Queue’s implementation has eliminated many instances of duplicate manual entry, significantly reducing potential for errors and speeding financial processes. For example, Queue integrated Microsoft applications involved in back office to save ORC time. Dynamics SL now integrates information from ORC’s Microsoft CRM regarding new sales without manual retrieval. With Queue’s assistance, ORC’s proprietary timesheet system is also connected with Dynamics SL. Currently, Microsoft CRM, Dynamics SL and ORC’s proprietary timesheet system are all connected globally.

Expanded business and support of new revenue streams. The new global integration has allowed ORC to view their business on a global scale. For example, in a matrix organization like ORC, revenue streams can be viewed either on a regional basis or

on any of the global expertise basis. For example, employee research, a service offering that ORC has great specialty in the UK, is now being deployed globally and the revenue and margin of this service offering can be easily tracked globally.

A Scalable Tool for the Future

In Lee’s opinion, the implementation of Microsoft Dynamics SL will afford numerous efficiencies moving forward. “ORC is continuing to grow,” she explained. “With this system, we are becoming a best practice for our own new divisions and acquisitions. Dynamics SL supports our company and its project management focus very well. We have not had to customize extensively, which means we will be able to take advantage of upgrades in the future without undertaking major overhauls. And because it is quite easy to use and to implement, when we undergo our next acquisition, we can convert the acquired company’s finance systems relatively easily”

The Recommendation

“We are happy with our partnership with Jeffrey Goldstein and Queue Associates,” stated Lee. “Their team is easy to work with and have a strong project management expertise. And if the road gets rocky, they will listen to and address customers’ concerns on a timely basis. “The partnership relationship is what I value the most”, stated Lee.

For More Information:
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