



Customer Solution Case Study



Small and Midmarket Solutions & Partners



Professional Services Company Streamlines Accounting Systems and Increases Client Loyalty

Overview

Country: United States
Industry: Professional Services
Company Size: 45 Employees

Key Results:

- Labor savings of U.S.\$400 to \$700 per week
- Accounts Receivables cycle reduced by 8 to 10 days, saving approximately \$7,000 annually
- ROI is expected to be reached within 16 months
- Estimated cost savings of \$40,000 for 2004
- Programming cycle reduced by 15 % per project

“Because billing information has a single entry point, we are no longer resubmitting corrected invoices to clients. This reduced the receivables cycle by 8 to 10 days, saving approximately \$7,000 annually.”

Brian Haenni, Vice President of Operations, Carney

Carney develops Web-based learning and knowledge management solutions. Carney has 45 employees and is headquartered in Alexandria, Virginia. In early 2003, Carney began to evaluate cost accounting and project management solutions to streamline internal processes. Carney partnered with a Microsoft® Certified Business Solutions Partner because of the partner’s expertise with professional services and project-based organizations. Together, the companies implemented a fully-integrated project management and financial solution to meet Carney’s needs. As a result, in 2004, Carney reaped a cost savings in excess of \$40,000 and a return on investment (ROI) within 16 months.

| Client Summary | Business Needs | Business Impact | Technology Solutions |
|---|--|--|--|
| Carney is a professional-services company that creates knowledge and education solutions primarily for government agencies. The company develops Web-based custom training and learning programs. It has 45 employees and is headquartered in Alexandria, Virginia. | Working with their Microsoft partner, Carney decided to implement solutions from Microsoft that could minimize redundancies and streamline processes, increase communication across the organization, and help Carney improve client loyalty while maintaining aggressive goals. | <ul style="list-style-type: none"> ▪ Improves data sharing and analysis ▪ Increases internal communications and efficiency ▪ Provides superior client service and products priced consistently, resulting in greater client loyalty | Carney implemented Microsoft® Dynamics SL (formerly Solomon) for accounting functions and Microsoft Project Server 2003 for project management capabilities. Carney also uses Microsoft Office Professional Edition 2003 for many internal business practices. |

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Brian Haenni, Vice President of Operations, Carney

Business Needs

With three separate systems for project management, cost accounting, and timesheet reporting, Carney could not easily share data across the systems, which limited the company’s ability to expand and hindered data storage and productivity. Carney realized that it had outgrown its systems and needed to upgrade its business systems into one powerful system.

Another limitation to the growth of the business was Carney’s actual project-management program. Because of the three separate systems, individuals involved in a project could not easily access data to update project timelines, notes, or information; resulting in problems with tracking and monitoring specific projects. Often, information and efforts had to be duplicated, increasing the time that employees spent on administrative tasks.

Finally, Carney realized that improving its business systems would promote client loyalty, which in turn would result in stronger relationships and additional business. When the economy took a downturn three years ago, Carney realized it needed a way to capitalize on existing business relations to make up for lost accounts. The company looked to continue developing relationships while providing superior client service and developing excellent products. Working with their partner, Carney decided on solutions from Microsoft to minimize redundancies, increase communication across the organization, and help the company increase client loyalty while continuing to set aggressive business goals.

Business Impact

Easier Data Sharing and Analysis

By implementing Microsoft® Dynamics SL for accounting functions and Microsoft Project Server 2003 for project management, Carney has gained greater visibility of expenditures and costs, allowing managers to ask better questions and conduct more efficient analysis. The new system has also significantly reduced operating costs.

Because the new project management and accounting programs share data stored on a single Microsoft SQL Server™ 2000 database, employees no longer need to duplicate data and use other programs to cross-reference data from different applications. Carney has also significantly reduced the administrative time spent on data entry and tracking project plans and has eliminated the need to maintain redundant data sources.

One direct result is an improvement in Carney’s client-billing process. Now that all of the company’s data is kept on a single server and shared between the accounting and the project management programs, timesheet tracking is more efficient and accurate.

“After having the system live for just three weeks, we had already seen labor savings in the range of \$400 to \$700 per week,” says Brian Haenni, Vice President of Operations for Carney.

A SQL Server database, part of the Microsoft Windows Server System™ integrated server software, provides a single environment in which to capture and communicate information. A reporting exercise that used to take 12 hours now takes 5 to 10 minutes because data is stored in a single location; users no longer need to locate and organize the needed data. Thanks to the technology’s powerful reporting capabilities, Carney now spends time analyzing data from various reports such as cost analysis, budget, and profit-and-loss reports.

Increased Communication

SQL Server and Microsoft Office Access 2003 provide centralized knowledge management tools that project-team members can access and update regularly. The improved resource management helps keep all team members up-to-date and in communication. Project managers, resource managers, senior management, accounting, IT, and other departments can work together more effectively and rapidly to meet their specific roles and responsibilities. Project managers also are more confident in setting appropriate goals and expectations per project because data is more accurate.

“All information is immediate and up-to-date. No longer do we have to keep information in a variety of locations and sources within multiple subsystems,” says Haenni. “We are now able to track project budgets in different ways, such as by milestone and by functional group.”

Microsoft Project 2003 is used to manage schedules, resources, and milestones for projects. In addition, Microsoft Office Word 2003 is used to create storyboards, which provide text, graphic descriptions, and animation directions for what the resulting products will ultimately look like. The process is automated by linking specific storyboard information directly to development environments. The automated link eliminates double-entry of information, improves version control, and streamlines the production process. As a result, Carney has reduced programming time by 15% per project.

Improved Client Loyalty

Three years ago, Carney's business was 50 percent private industry and 50 percent government contracts. Recently, when its client base changed to reflect 90 percent government and 10 percent private industry accounts, Carney focused on developing the relationships with its government clients. It managed to deliver knowledge and educational solutions above expectations for those clients and develop many new relationships because of a high level of client service. Carney views its new accounting systems as part of its client-strengthening efforts, because the company has been able to improve upon client-facing systems, such as billing, without increasing costs for clients.

In the past, billing information sometimes had to be resubmitted to clients because of errors. Now the management team and other employees are confident that the information is reliable and accurate. This accuracy allows the company to realize a quicker billing cycle and an immediate savings.

“Because billing information has a single entry point, we are no longer resubmitting corrected invoices to clients. This reduced the receivables cycle by 8 to 10 days, saving approximately \$7,000 annually,” states Haenni.

Carney now sends bills to clients days and sometimes weeks earlier than it did before. The savings in time, resources, and money has already improved the bottom line and promises to continue to do so over time. Client loyalty is at a record high, and Carney strives to increase that loyalty by being innovative and providing award-winning training programs at a reasonable cost.

Technology Solutions

Carney chose Microsoft Dynamics SL for its accounting needs and Microsoft Project Server 2003 and Microsoft Project Professional 2003 for the company's project management functions. Working with their partner, Carney chose those programs for several reasons. Together, they provide centralized project and resource management, single entry points for data, instantaneous integration, and real-time reporting and analysis.

Software

- Microsoft Dynamics SL
- Microsoft Office Professional Edition 2003
- Microsoft Office Project Professional 2003
- Microsoft Office Project Server 2003
- Microsoft SQL Server 2000
- Microsoft Windows 2003 Server

Hardware

- Dell Latitude D600 laptops
- Dell Precision 360 desktops
- Dell PowerEdge 2450 servers

All information is stored on SQL Server, where the data can be accessed by both the Microsoft Solomon and Project programs. In addition, those programs meant Carney could take advantage of other Microsoft technologies it already had in place, such as Microsoft Office Professional Edition 2003, thereby lowering the total cost of ownership and providing in-house customization potential.

Carney has benefited greatly from its solution thus far. The company has seen increased client loyalty as well as significantly reduced internal operating costs. Today, Carney continues to find new ways in which technology can improve its business.

For More Information

For more information about Microsoft Dynamics SL, call Synergy Business Solutions at 800-481-8590. To access information using the World Wide Web, go to www.synergybusiness.com

For more information about Carney products and services, call (703) 836-2400, or visit the Web site at www.teamcarney.com.

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