Integrity Data.
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Tech Company Values Flexible Approach To Move From Dynamics GP to Dynamics 365 Business Central

Customer:
Integrity Data

Industry:
Software Provider

Organization Size:
10-50 employees

Headquarters:
Lincoln, IL

Former System:
Microsoft Dynamics GP

New Solution:
Microsoft Dynamics 365 Business Central

Highlights:

- Flexible implementation approach to assist where needed.

- Connected cloud systems give a single source of truth and consolidated reporting.

- Creative uses of Microsoft Power Platform increase efficiency.

About Integrity Data

Integrity Data provides SaaS-based HR and Payroll solutions for thousands of companies worldwide. Their offering handles the entire recruit-to-retire process, making it easy to recruit, onboard, pay, manage benefits, track time, and more.

The Challenge

Integrity Data had been using Dynamics GP since 2002 but had begun to feel some limitations. They had multiple on-premises systems that did not connect, which limited their ability to analyze data.

They knew integrating cloud applications would be easier and offer security benefits. Plus, they wanted to better leverage Microsoft Power Platform applications.

It was time to move to a cloud-based ERP system.

Could they find the right system with a partner that was willing to use the unique strengths of their team?

The Solution

Integrity Data is a Microsoft Partner and supports customers using Microsoft Dynamics 365 Business Central. However, Tom Franz, Director of Finance and Systems at Integrity Data, felt it was his duty to make an informed decision.

Tom recalls: *"In addition to Business Central, we evaluated several other options, including NetSuite. In the end, there was no competitive advantage that those other solutions could provide us."* It became clear that a move to Microsoft Dynamics 365 Business Central was the right choice.

With over 20 years working in the Microsoft Dynamics community, they had a wide network of implementation partners to choose from. Because their team already had experience with the product, they needed a partner that would offer a flexible approach and help where needed. They selected Mount Evans Consulting because of the solid reputation of Kristen Hosman.

Likening the process to a paint-by-number picture, Tom notes: *"Kristen put the picture together with all the numbers and allowed us to fill in those areas where we felt we had the expertise internally. Then she jumped in to fill in the rest, so the entire Business Central implementation was completed the right way."*

The Benefits:
Dynamics 365 Business Central

Data Visibility and Reporting. Being able to make sound business decisions from a "single source of truth" was a major factor in the decision to move to Business Central. Tom states: *"With Business Central, we have much greater data visibility than ever before. We can pull in subscription data, support case data, and invoicing data from our three main systems and analyze it together using powerful tools like Microsoft Power BI. This helps us make data-driven business decisions with ease."*

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As an example, many SaaS companies follow their Monthly Recurring Revenue (MRR) metric as a Key Performance Indicator (KPI). Tom relates: *"We had an MRR value before when we were on Dynamics GP, but we couldn't rely on it because much of the data needed to accurately calculate that value was in other systems. Today, having one single source of truth — one single data set — gives us the complete picture so we can be sure that our MRR is growing at a healthy rate."*

Automating Manual Processes. When Integrity Data moved from annual to monthly billing, they anticipated sending thousands of invoices per month, and knew the process had to be streamlined.

Mount Evans Consulting developed a Power Automate solution that finds invoice creation activities in their billing system and automatically creates the appropriate invoice in Business Central. Tom recalls: *"Before using Power Automate with Business Central, it would have required a full-time employee just to deal with invoicing. Now our process is running smoothly and can be handled in as little as one day a month."*

Painless Upgrades and Reduced IT Expense. Business Central eliminated the worry that used to come with on-premises upgrades. It also allowed Integrity Data to retire their old server hardware and reduce other IT-related expenses. *"Had we stayed with Dynamics GP, we would have had to upgrade SQL Server and the operating system with the associated licensing costs. Not having to maintain the IT infrastructure has been a huge time and cost savings,"* Tom said.

Creative Uses of Microsoft Power Platform. Since January 2021, Integrity Data has used Microsoft Power Platform to create:

- Over 60 Power BI reports that provide insight into customers and their subscriptions, financial data, and customer product usage.

- 5 internal-use Power Apps, with several more in the works.

- Over 60 separate "Flows" using Power Automate to connect systems and provide notifications of business activities.

In addition to all the benefits, now that Integrity Data is running their business on Microsoft Dynamics 365 Business Central, they have an enhanced perspective on the needs of their clients who work in a cloud-connected world. This will help them develop more innovative solutions for years to come.

"Kristen gave us the training we needed to be effective day to day and is still available to help us with more troublesome issues. She is very good at letting us know what issues might pop up based on what she's heard on social channels or with other clients. We delayed an upgrade because of a known issue she made us aware of in advance. That type of proactive communication makes a big difference."

Tom Franz,
Integrity Data

The Benefits:
Mount Evans Consulting

Trained to be Self Sufficient. Integrity Data wanted just the right level of interaction with their implementation partner, before and after the implementation. Tom recalls: *"Kristen gave us the training we needed to be effective day to day and is still available to help us with more troublesome issues. She is very good at letting us know what issues might pop up based on what she's heard on social channels or with other clients. We delayed an upgrade because of a known issue she made us aware of in advance. That type of proactive communication makes a big difference."*

Personal Communication. As a small team, Mount Evans Consulting can offer personal interaction with customers that is often lost when working with large organizations. Tom notes: *"The small size of Mount Evans Consulting has not been an issue at all, in fact it is more of a benefit. It allows for more personal communication. I have a relationship I know will last, instead of wondering if my consultant will change every six months due to the turnover at large organizations."*

Experience You Can Trust. Would Integrity Data recommend Mount Evans Consulting to other companies considering a move to Microsoft Dynamics 365 Business Central? Tom exclaims: *"I can absolutely recommend Mount Evans Consulting. You can trust Kristen's expertise. She knows what she's talking about. She's been through this multiple times. She knows the pitfalls. She knows the challenges that will arise and will help you overcome them. If you follow her process, you'll be successful. Don't try to short-circuit it. You're only going to cause yourself issues down the road."*

"Before using the Power Automate workflow with Business Central that Mount Evans Consulting created for us, it would have required a full-time employee just to deal with invoicing. Now our process is running smoothly and can be handled in as little as one day a month."

**Tom Franz,
Integrity Data**