



SUCCESS STORY DEEP DIVE

iCatalyst helps Scitech realise potential of Microsoft Dynamics 365

Scitech faced significant challenges with financial reporting and data management. The initial implementation of Microsoft Dynamics 365 Finance and Operations did not meet their expectations, as Scitech believed it lacked alignment with their specific business needs and processes.

This misalignment resulted in inefficient workflows, inadequate reporting capabilities, and user frustration. However, with the appointment of new senior management, Scitech reevaluated their business requirements and engaged iCatalyst, seeking a partner committed to personalised service to gain a deep understanding of their operations.

iCatalyst's involvement proved transformative for Scitech. Through comprehensive training, optimised configurations, and the introduction of Microsoft Power BI, iCatalyst helped Scitech realise the full potential of Dynamics 365.

This collaboration led to improved financial management, real-time reporting, enhanced data security, and streamlined procurement processes. The continued support and expertise provided by iCatalyst have enabled Scitech to achieve better efficiency and user satisfaction, driving sustainable growth and innovation.

BUSINESS ALIGNMENT WAS CRITICAL

At the centre of everything we do is our people.

Driven by a philosophy of innovation and education, Scitech recognised the need to upgrade their antiquated financial systems that operated in silos. Their goal was to implement the latest enterprise resource planning (ERP) technology to streamline internal financial processes.

Whilst the new ERP solution was implemented prior to his joining the team, Nigel Barrett, Procurement Manager, reflected on the challenges Scitech faced before adopting Microsoft Dynamics 365 Finance and Operations (FinOps): “The business was previously using Navision. We believe part of the justification for FinOps was all the project reporting we could do, and system-based purchase requisition workflow leading to more efficient AP processes.”

In their initial attempts to centralise financial processes and improve workflows, Scitech's experience with Dynamics 365 fell short. “We didn't really know or understand how it all fitted together, and we weren't given the benefit of understanding the power of FinOps,” Barrett said.

This challenge was exacerbated when a new finance team joined the organisation. Without a transfer of knowledge regarding the solution's capabilities, this misalignment led to a lack of confidence and questioning of Dynamics 365's value.

A significant investment for a not-for-profit organisation, Scitech's timely appointment of a new CFO and CEO resulted in the reassessment of their ERP needs.



SCITECH SOUGHT A “PERSONALISED SERVICE”

To re-evaluate if Dynamics 365 Finance and Operations remained fit for purpose, Scitech sought a new Microsoft Solutions Partner.

They prioritised a local, experienced partner for future support and engaged iCatalyst to candidly discuss their business requirements, even considering downsizing their ERP solution.

“One of the key statements that immediately resonated with us was iCatalyst’s commitment to ‘personalised service’,” said Barrett. “We wanted a partner that was willing to understand our business requirements and deliver the right solution that optimised our operations.”

iCatalyst promptly focused on mapping Scitech’s needs to the solution. They identified that Scitech’s limited understanding of Dynamics 365’s capabilities, particularly in the Finance domain, necessitated extensive training.

Additionally, the existing reporting capabilities were inadequate, requiring time-consuming manual report generation and distribution.

iCatalyst also recognised Scitech’s procurement process was overly complex, with extensive lists of categories and data security issues arising from the use of spreadsheets.

Leveraging their extensive experience in delivering Microsoft Business Applications, iCatalyst empowered Scitech to make an informed decision to retain FinOps as their core ERP solution, avoiding unnecessary costs associated with switching systems.

iCatalyst recommended bolstering confidence in FinOps through targeted training and enhanced workflows tailored to Scitech’s specific business requirements.

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UNDERSTANDING THE POWER OF DYNAMICS 365

To swiftly address Scitech's challenges, iCatalyst provided training and awareness across Dynamics 365, with several of their solution experts playing pivotal roles in enhancing the team's understanding of FinOps. "From a finance perspective, having consultants with a financial background was gold," said Barrett. "iCatalyst were able to talk to our team in their language, whilst having the benefit of understanding the capabilities of the solution they were teaching."

Through extensive training, iCatalyst helped Scitech realise the full reporting potential of Dynamics 365 out-of-the-box. "We had no idea of how to get access to this wealth of information we'd put in there," said Barrett. "So, they were able to open our eyes to that."

Moreover, iCatalyst introduced Microsoft Power BI, revolutionising the reporting process. Previously, reporting was achieved through the exporting of individual reports, which were emailed to each budget manager. "Scitech was hindered by the manual, time-consuming process that was required to make it understandable and digestible," said Barrett. Today, it's a seamless process, enabling operational managers to access real-time budgetary data and streamline decision-making.

"With iCatalyst's help, we overlaid FinOps with Power BI. They were instrumental in taking us down that path and received positive feedback from our operational managers, who are now empowered and have access to real-time budgetary data for informed decisions," Barrett stated.

The integration of Power BI dashboards has also enhanced data security within Scitech. "The budget manager can only see their budget and limited to permissions in Dynamics. There is always a risk sending spreadsheets around, so additional security of what data people can see is crucial," Barrett noted.

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PROVIDING EXPERTISE WHERE IT COUNTS

Leveraging iCatalyst's extensive expertise, Scitech refined their procurement process by consolidating the existing out-of-the-box categories into a manageable list and linking project categories cleanly, enhancing usability and efficiency.

"We used to have a huge list of procurement categories for our teams to select from. That was a big bugbear of our users because they had to scroll through this long menu to reach the one they wanted," said Barrett.

"With iCatalyst's help, we've refined that list – now that we understand what those procurement categories are actually for – to a much smaller, manageable list for our user base."

Scitech also leaned on iCatalyst's knowledge to optimise their WIP Capitalised Projects reporting. By utilising the Project Management module, Scitech has experienced more accurate reporting and a streamlined user experience.

Previously, the setup was inconsistent, leading to frustration among users. "We were just using it," said Barrett. "We had projects set up very inconsistently. They weren't defaulting in common data, and users had to go through multiple tabs on their order to fill in all the details for the requisition to be passed through, which was very time-consuming."

By collaborating with iCatalyst, Scitech has enhanced the configuration and workflow with the Project Management module, reducing the number of click-throughs and data entry required.

"Because we now understand how the module fits together – we can mandate default values for our projects, ensuring the team enters as little information as possible to get the best outcome."

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FOCUS COUNTS IS OUR PHILOSOPHY

From the outset, iCatalyst understood that Scitech is a not-for-profit organisation therefore needing a value-based approach to fit within budget. They have championed the business's financial limitations, especially regarding licensing. Barrett noted, "Whenever there is a chance to save on licensing – they will let us know. They are always sensitive to our challenges as a charity."

The expertise and dedication provided by iCatalyst have been invaluable for Scitech. Barrett added, "We love collaborating with iCatalyst and learning from them. They have a real passion and enthusiasm to help us. We really connect to that, as we emphasise passion as one of our values – so to see that in a partner is great."

A small organisation, Scitech cannot afford to have an IT specialist dedicated to the management and on-going development of Dynamics 365. Barrett said, "iCatalyst have given us the knowledge and expertise—when we need it—as if they work as a part of our team. We have a great relationship because we can talk to them face-to-face. They understand our business needs and are very responsive."

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CHAMPIONING FUTURE EFFICIENCIES WITH DYNAMICS 365

Looking to the future, Scitech continues to rely on iCatalyst's expertise to explore further efficiencies with Dynamics 365. With plans to leverage additional modules and continuously optimise their existing setup, Scitech aims to drive innovation and enhance operational efficiency.

Barrett highlighted other areas they wish to explore, "I want to explore contract management and better project management—we feel we are only touching the surface of what the Project Management module can do. There is a lot we want to do but the main constraint is budget, so it will be little incremental changes and enhancements."

iCatalyst remains committed to providing Scitech with the support and guidance needed to achieve these transformation goals. Their ongoing collaboration ensures that Scitech can navigate budget constraints while continuing to make impactful improvements. "The team are brilliant," praised Barrett. "They are always willing to jump in and help."

The partnership between Scitech and iCatalyst demonstrates how a personalised approach and a thorough understanding of business needs can foster sustainable growth and innovation.



SOLUTIONS AND SERVICES DELIVERED:

- Enhancements to existing Microsoft Dynamics 365 Finance and Operations
- Microsoft Power BI implementation and integration
- Solution Architecture and Project Management Services
- On-going Support and Managed Services



FEATURED CUSTOMER – SCITECH

Scitech is a not-for-profit, charity organisation driven by their purpose to inspire engagement by all Western Australians in science, technology, engineering and mathematics. Through innovative, hands-on exhibits, dynamic programs, and engaging events, Scitech makes science accessible and inspiring for all ages. Scitech is committed to nurturing the next generation of thinkers, innovators, and problem-solvers, empowering them to shape the future.

For more information, visit scitech.org.au.

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