



Microsoft Dynamics Customer Solution Case Study



Overview

Country or Region: United States

Industry: Mechanical Contracting

Customer Profile

Linc Service and Mechanical, part of The Linc Group in the United States, provides innovative preventive maintenance for heating, air conditioning, and control systems.

Business Situation

The organization's users relied on bespoke business applications and a legacy UNIX financial management system. The highly decentralized environment lacked consistency and limited information access.

Solution

The company worked with Microsoft® Gold Certified Partner Iteration2 to take part in the Microsoft Dynamics™ AX 4.0 Technology Adoption Program (TAP).

Benefits

- New integration with Microsoft® technologies adds value.
- Enhanced security for centralized management.
- Central data and workflows boost employee productivity.
- Business intelligence features support critical decisions.
- System will scale easily with future growth.

New Solution Supports Advanced Business Decisions by Service Company Employees

“Managers are alerted, based on performance indicators, of what’s going on in their business. They can now manage these by exception, and spend more time mentoring and coaching others to do the same.”

Greg Lush, Chief Information Officer (CIO), The Linc Group

Linc Service and Mechanical operates from 18 locations across the United States. Its employees relied on customized business applications and a legacy UNIX-based financial management system, which limited information access for users. The company worked with Microsoft® Gold Certified Partner Iteration2 to take part in the Microsoft Dynamics™ AX 4.0 Technology Adoption Program (TAP). This involved building a working solution using the latest version of the application prior to its official release, with the added benefit of the highest level of product support and early access to new product features. The solution offers enhanced integration with Microsoft technologies and applications, helping to create transparency of data across the business. This data can be accessed by users from any location, and enhanced features and tools help them make critical, timely business decisions.



Situation

The Linc Group, based in the United States, provides mission-critical facility management services, and is the parent organization of Linc Service and Mechanical, Linc Network, Linc Facility Services, and GreenHomes America. The Linc Service and Mechanical Group provides innovative preventive maintenance for heating, air conditioning, and control systems. Its professional team develops and implements energy-improvement strategies across the country.

The group has 250 field service technicians, and 50 employees in supporting functions across 18 locations. Over time, this highly distributed environment led to reliance on a series of custom-built business management applications and a legacy UNIX-based financial management system. Greg Lush, Chief Information Officer (CIO), The Linc Group, says: "Our financial management system was 10 years old and highly customized. It had become unsupported and lacked business rules and logic."

Lush says that The Linc Group is founded on a strong quality management discipline. "We have always worked to the principle 'do what you say you are going to do and be able to prove it'. But, our highly decentralized work environment lacked consistency, and with no central access to information, it was almost impossible to prove anything."

The UNIX system simply offered back-office financial management. It was inaccessible to engineers in the field, and could not accommodate any work-order management functionality. The organization's Corporate Environment and Facilities Group also used PeopleSoft software for managing financials. The presentation of information from these

applications to employees outside the group, or integration with other areas of the business relied on manual, cost-intensive internal development and support.

Yet Lush believed that a highly customized solution was not the answer. A new solution needed to have these features and tools already built in. "Some field service businesses will take a financial system and try to stretch it to be something else," he says. "But it means that people often can't access the information they require. For example, engineers in the field need to know what equipment they are working on, the materials they need, the name of the engineer who worked on it last, and the problems they had.

"We needed a solution that was deeply focused on our vertical of field service, as well as a fully integrated component to our financial system, not an extension of the financial system," he says.

Solution

In 2004, the organization re-examined its IT infrastructure and deployed an entire Microsoft®-based solution. This included Microsoft Windows Server™ 2003 enterprise operating system, and Microsoft Exchange Server 2003 communication and collaboration server, part of Microsoft Windows Server System™ Engineered.

Microsoft SQL Server® 2005 provides powerful database support, and Microsoft Office applications, such as Microsoft Office SharePoint® Portal Server 2003, help consolidate and share information across the highly distributed workforce.

The organization was also in the process of evaluating Microsoft Dynamics™ AX 3.0 business management software, with Field Services for Microsoft Dynamics AX, with the help of Microsoft Gold Partner Iteration2. “Our colleagues at Iteration2 know how adamant we are about avoiding customization and how serious we are about trustworthy computing. But with Microsoft Dynamics AX 3.0, some concepts we required, such as integration with Active Directory® directory services, weren’t yet available inside the core product,” says Lush.

TAP Program

Not far into this implementation, Microsoft launched the Microsoft Dynamics AX 4.0 Technology Adoption Program (TAP) for a selected group of companies. This program requires partners to work with customers to build working solutions using the latest version of the technology prior to its official release. In return, participants can interact directly with Microsoft product development and support services representatives and gain the highest level of product support. Early access to new product features gives these customers a head start over their competitors and a unique, working insight into the latest solutions that will add value to their business.

Linc Service and Mechanical was keen to take part in the program. “Deploying the new version of Microsoft Dynamics AX prevented the need for customization, and gave us the opportunity to influence the product according to mechanical contracting needs,” says Lush. “By taking part in TAP, we can also mould the product in line with our industry needs.”

Microsoft Dynamics AX 4.0 also aligns with Lush’s desire to create a completely visible and transparent organization. Its seamless integration with existing Microsoft technologies means that Linc Service and Mechanical has been able to divide its business into four key pillars. These are:

- Financial management
- Work order management
- Relationship management
- Enterprise management

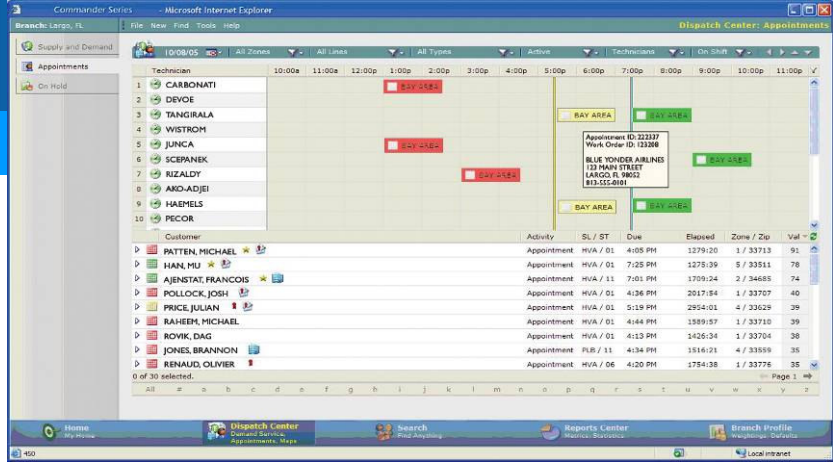
“The solution exploits the entire Microsoft stack to provide us with far more than just financial management,” says Lush. “As a result, the solution matches our internal processes, without extensive customization.”

Sales

Sales representatives now use a central repository of customer data in Microsoft Dynamics CRM. The Microsoft Office Accelerator for Proposals tool within SharePoint Portal Server 2003 helps them manage proposals and create sales orders. The data from these orders is separated into different accounts, and using Web services, automatically dropped into custom Web parts in SharePoint Portal Server 2003.

Operations

The operations manager uses SQL Server 2005 Reporting Services to analyze the data in Accounting and Financial Management modules within Microsoft Dynamics AX. The Microsoft Dynamics AX Project Accounting module helps these users to measure total dollars available, dynamically calculate costs and resources, and generate ‘what if’ scenarios to help determine the best direction for project spend.



Field Services

Engineers and field service technicians can manage the entire service order from request, through to optimized dispatch, and onsite completion. Field representatives access the right information at the right time—with full visibility to installed equipment, service order requirements, and customer warranty or contract information.

“Schedules and work orders are then dispatched wirelessly to Microsoft Windows Mobile™-based Pocket PC devices held by our engineers. They can see all the detail they need from any location,” says Lush. “Customers can sign the screen when a job is complete, and the information returns to the Field Services module in real time.”

Management

Business systems managers will approve or reject cost summaries based on this information and pass projects to financial managers who set up the contracts. The information also becomes available in the Field Services for Microsoft Dynamics AX solution.

Benefits

The deployment of Microsoft Dynamics AX 4.0, with its enhanced functionality, open integration architecture, security, and scalability capabilities, will help the organization to add significant value to its existing IT investment. Even more importantly, users from any branch across the country or from the field can use innovative tools to access and use data without costly customization.

New Features for Enhanced Security

New features in Microsoft Dynamics AX 4.0 offer the level of additional security needed by highly-distributed organizations such as The Linc Group. All of the company’s 109 locations use a third-party outsourced data center, and users access their applications through the Internet. “The solution’s advanced security and performance features were among the motivating factors for extending our project to participate in TAP,” says Lush.

“All our applications are accessed by an Active Directory-based log on for improved administration, meaning we can be more disciplined about having all of our employees and applications use a single point of sign on. Trustworthy computing is really important.”

Easy To Use, Familiar Interfaces

Microsoft Dynamics AX 4.0 continues to provide users with a familiar user interface to keep training costs down and boost productivity from the start. With ease of use as a central design theme, adoption is rapid. “People love it because it is integrated closely with Microsoft Office Outlook® 2003 and looks very similar,” says Lush.

“Microsoft Dynamics CRM also runs through the Microsoft Outlook client or through a Web interface. But 90 per cent of users choose the Outlook interface because they are more comfortable with it.”

Standardized Solution Boosts Employee Efficiency

Using the previous system, most employees—from service managers and financial managers, to field service engineers—relied heavily on manual processes. Paper documents slowed business activity, and

business system managers had to key in all accounts data into the system.

“There are always challenges with data integrity when a person has to enter multiple items of data. But automation has made a significant difference, and with Microsoft Dynamics AX 4.0, even our field service engineers can access the same information as their colleagues from any location,” says Lush.

Data can be displayed quickly and consistently, and it is always accurate and up to date. All accounts are held centrally, not hidden in individuals’ systems in different branches or filed in a disorganized manner.

“Before, statistical analysis of the business, or locating best practices information was almost impossible. Now we can enforce a standard approach,” says Lush. “With skilful use of Active Directory, and other security policies, we can now use data to continue to grow our organization, and learn better, more efficient ways of doing business.”

Business Intelligence Supports Enhanced Decision Making

Now that Microsoft Dynamics AX uses Microsoft SQL Server Reporting Services, business intelligence is easier and more accessible. Users can create day-to-day operational and management reports, which support more informed, timely business decisions. They can use this information to help prevent problems before they occur, or build detailed new strategies to increase the organization’s competitive advantage.

Ad hoc reporting is available to business users on demand, helping to free up IT professionals to work on more value-added

activities. Using modules such as Balanced Scorecard, employees can analyze and measure performance and see business opportunities as they emerge.

“People have the business intelligence tools to help compel decisions whenever they’re required,” says Lush. “Business system managers or general managers are alerted, based on performance indicators, of what’s going on in the business. They can now manage these by exception, and spend more time mentoring and coaching others to do the same.

“With this technology, we can empower people to their jobs more efficiently, collaborate, mentor, and build a successful team, not just system. As a service company, this is what is important to us.”

Easy Compliance with External Legislation

Lush emphasizes that regulatory and compliance legislation, such as the Sarbanes-Oxley Act, creates additional requirements for transparency and control across the organization. The legislation states that all business records, including electronic records and electronic messages, must be saved for five years.

This means that IT teams must create and maintain corporate records cost-effectively. At the moment, corporate financials are still held in the PeopleSoft application, but as Lush explains, Microsoft Dynamics AX 4.0 has already solved the problem out of the box.

“Sarbanes-Oxley adheres to our philosophical approach to business of ‘do what you say you’re going to do and prove it’. Microsoft Dynamics AX 4.0 supports this because it comes with built-in integration with Microsoft

BizTalk® Server 2004,” he says. “It means that we can direct discreet, auditable business processes between our enterprise applications and consolidate our treasury and financial information quickly.”

Scales Easily to Support Business Growth

The solution aligns closely with the company’s strategy, supporting the rapid expansion plans of Linc Service and Mechanical, as well as eventual deployment across all other businesses in The Linc Group.

Close integration with Active Directory means that common computer and user settings are centralized in Group Policies for fast configuration of applications. This infrastructure is not only easily scalable, but also new branches can be up and running with Microsoft Dynamics AX quickly and cost effectively.

“We expect our return on investment figures to be significant, thanks to the cost savings of faster development when setting up multiple environments as the business grows,” says Lush.

“Some of our branches may only be U.S.\$5 million businesses, but we may have 28 of those or more. With this technology, we can remain agile and deploy this solution in new branches quickly and in a standardized way. This is a huge benefit.”

For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234 in the United States or (905) 568-9641 in Canada. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to: www.microsoft.com

For more information about Iteration2 products and services, visit the Web site at: www.iteration2.com

For more information about The Linc Group products and services, visit the Web site at: www.thelincgroup.com

Microsoft Dynamics

Microsoft Dynamics™ is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to: www.microsoft.com/dynamics

Software and Services

- Microsoft Windows Server System Engineered
 - Microsoft Windows Server 2003 Standard Edition
 - Microsoft SQL Server 2005
 - Microsoft BizTalk Server 2004
 - Microsoft Exchange Server 2003
- Microsoft Dynamics
 - Microsoft Dynamics AX 4.0
- Microsoft Office System
 - Microsoft Office Outlook 2003
 - Microsoft Office SharePoint Portal Server 2003
- Technologies
 - Active Directory
 - Web services

Partners

- Iteration2

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