



Columbus®

Shepherds Friendly

How Columbus helped one of the world's oldest financial mutual societies upgrade their legacy ERP solution and boost efficiency

Introduction

Founded in 1826 on Christmas Day, Shepherds Friendly Society is one of the world's oldest financial mutual societies. They started as a sickness and benefits society, with the aim of having a mutually beneficial society in which the founders could invest to provide financial support in the event that sickness or injury prevented them from working.

Over 180 years later and this is still the core focus of the society, despite its expansion into other products and services. Shepherds Friendly is no longer just a sickness and benefits society; they also offer over 50s life insurance plans and a range of investment opportunities for individuals, including family members investing on behalf of children.



The challenge

Shepherds Friendly had been using Microsoft Dynamics NAV 2009 which was coming to the end of its version support with Microsoft. The company needed to upgrade to a more modern ERP system or face the risks of continuing to operate on old unsupported software.

Additionally, the legacy software was causing business inefficiencies, such as:



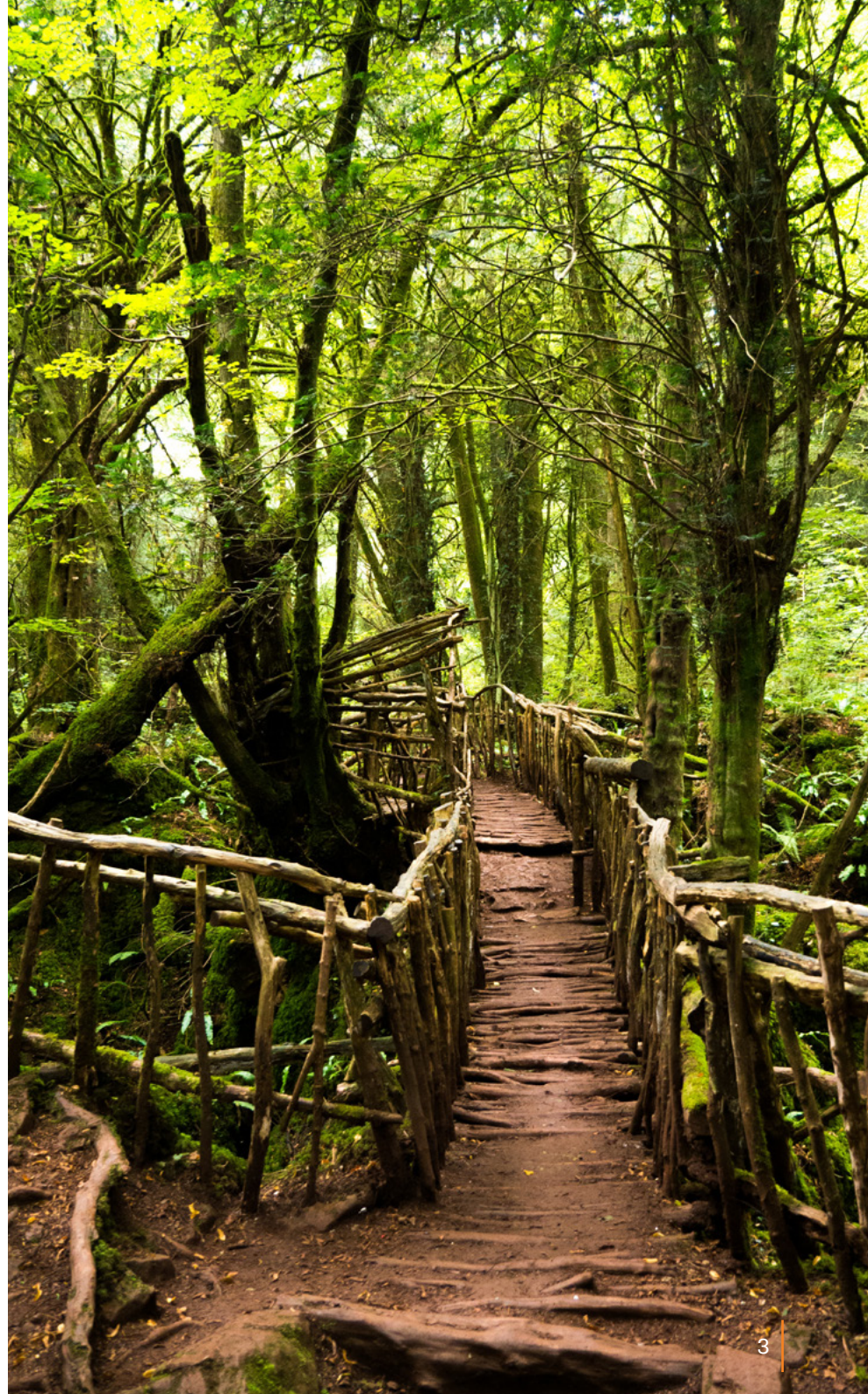
Limited automated controls

Time-consuming reporting processes



Data was difficult to access

IT team were having to spend a lot of time on security updates





The solution

Shepherds Friendly chose Microsoft Dynamics 365 Business Central to replace the legacy NAV system. Here's why:

- To rationalise and remove a number of currently bespoke modifications in their system, which will significantly reduce the costs for the new implementation and maintenance of Business Central.
- To cleanse and reduce the amount of data currently held in the new system to move forward with an appropriate level of data to be available in Business Central for auditing purposes.
- To comply with "Making Tax Digital" as the functionality isn't available as standard in the NAV 2009 version.
- Seamless Office integration is standard in Business Central, which will provide return of investment and time saving opportunities; preventing the need for arduous logging in and out processes.
- Shepherds wanted a Microsoft ERP solution to enable closer integration with their new, Microsoft-based, Customer Plan software.
- To make use of the latest technology platform resulting in potential reduced costs for future projects, such as Apps to replace complex bespoke developments.
- It's an opportunity to review and strengthen the existing Shepherds Friendly Business Intelligence strategy.

Shepherds Friendly chose the Columbus team as their implementation partner because of our experience in rolling out Microsoft solutions and our reputation as a Microsoft Partner.

Their original NAV software had multiple bespoke modifications that were added over the years that were specifically associated with their 'Shepherds Friendly' plans. This presented a potential challenge for any implementation team but the Columbus team was able to work through this.

We helped Shepherds Friendly transition to a more standard solution so they can benefit from regular updates, essentially ensuring they're always on the latest version of the solution.

"Columbus worked with Shepherds Friendly in close partnership to explain the Business Central roadmap. The project had a tight timescale to align with the end of Microsoft support and Columbus were able to deliver both on time and on budget to coincide with this date." - Derence Lee, Head of Finance at Shepherds Friendly





The benefits

Thanks to Columbus agile implementation process, Shepherds Friendly are now using Business Central with the addition of Jet reports with some powerful tailored reports to suit their finance specific requirements. Power BI will be a phase 2 project for Columbus.

Shepherds Friendly can now benefit from:

- Automated controls in Business Central. For example, journal authorisations are now managed via an e-mail approval workflow, which direct the requests to the relevant person and provides for fast and efficient document approvals.
- There's also much more automation when setting up new suppliers; allowing for their quick authorisation.
- The reporting process has greatly improved, saving significant amounts of time for teams. This time can now be focused on other critical tasks.
- Easy access to historic data which is ideal for auditing processes.
- The solution also offers an evergreen solution which provides operational resilience and satisfies Shepherds' compliance team as they will, from this point on, always be using the latest version of the software.
- Saves time for the Shepherds' Finance and IT teams. In particular, the IT team now no longer have to focus on regular security updates as these are managed through the Azure subscription.
- The flexibility offered by the cloud, combined with the security of Azure for data.

Working with Columbus

Microsoft Dynamics NAV had been a proven solution for the Shepherds Friendly team but they were outgrowing it. It made sense to migrate to Business Central, especially as this modern solution instilled them with the same confidence as NAV did. They just wanted to make sure they were working with the right Microsoft Partner and they found it in Columbus.

Derence Lee, Head of Finance at Shepherds Friendly said: “Columbus worked with Shepherds Friendly in close partnership to explain the Business Central roadmap. This allowed Shepherds to visualise how the solution would work for them, harnessing new cloud technologies which facilitated a smooth transition to a standard version of Business Central complemented by Jet Reports.

“The project had a tight timescale to align with the end of Microsoft support and Columbus were able to deliver both on time and on budget to coincide with this date.”



Contact:

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About Columbus

Columbus is a global IT services and consulting corporation with more than 2,000 employees serving our customers worldwide. We bring digital transformation into your business and position you to thrive far into the future.

We are experts in designing, developing, implementing, upgrading and maintaining digital business applications that help your business succeed in the digital transformation. Our consultants have experience in developing businesses in many different industries all over the world.

We offer a comprehensive solution portfolio with deep industry knowledge, extensive technology expertise and profound customer insight. We have proven this through 30 years of experience serving more than 5,000 customers worldwide.

Let us help you realise the full potential of your business.