



Microsoft Dynamics Customer Solution Case Study



Arboricultural Firm Enhances Service Management, Follows Path of Growth

Overview

Country or Region: United States

Industry: Professional services—other professional services

Customer Profile

Based in Wheeling, Illinois, The Care of Trees is an arboricultural firm that has 480 employees, 24 district offices, and serves 60,000 clients across seven states.

Business Situation

The Care of Trees identified Microsoft Dynamics® NAV 5.0 as an opportunity to further enhance internal operations and drive user adoption.

Solution

The company worked with Microsoft® Gold Certified Partner Solution Systems and deployed Microsoft Dynamics NAV 5.0, taking advantage of service order handling, the Fixed Assets module, integration with the Microsoft Office system, and more.

Benefits

- Improve adoption
- Drive efficiency and control
- Eliminate redundant tasks

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Peter Szoke, IT Director, The Care of Trees

The Care of Trees, an arboricultural firm based in Wheeling, Illinois, serves 60,000 clients across seven states. Working closely with Microsoft® Gold Certified Partner Solution Systems, the company has continued to upgrade Microsoft Dynamics® NAV to drive efficiencies throughout the company. Since 2001, the company has moved its focus from centralizing business management to streamlining day-to-day tasks. When Microsoft released Microsoft Dynamics NAV 5.0 in 2007, The Care of Trees saw the solution as an opportunity to take advantage of integration with the Microsoft Office system, service order handling, the Fixed Assets module, and more. Since upgrading, the company has witnessed improvements in user adoption and further streamlined business processes. With Microsoft Dynamics NAV 5.0, The Care of Trees estimates a time savings of 3,150 hours a year.



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Peter Szoke, IT Director, The Care of Trees

Situation

As the exclusive tree care company of the American Horticulture Society, The Care of Trees is an arboricultural firm that specializes in organic, environmentally sustainable tree preservation and serves more than 60,000 clients. Headquartered in Wheeling, Illinois, the company has 480 employees and generates U.S.\$50 million in revenue a year. The Care of Trees includes 24 district offices and serves commercial, municipal, and residential landscapes across seven states. With expansive operations, The Care of Trees relies on its sister company, Aerial Equipment, to service its fleet of more than 300 trucks.

To facilitate its mission of growth and continual service improvement, the company's three-person IT team is always on the lookout for new products and technologies that can improve operations. Working closely with Microsoft® Gold Certified Partner Solution Systems, The Care of Trees has kept its enterprise resource planning (ERP) systems in careful sync with business, initially deploying Navision® 2.6—an earlier version of Microsoft Dynamics® NAV—in 2001 to handle distribution and truck services at Aerial Equipment. “Back then, our challenge was the huge disconnect between business systems,” says Peter Szoke, IT Director of The Care of Trees. “We needed to ensure that everyone could look at the same business information, through the same system, at the same time.”

Since consolidating business management with Aerial Equipment, The Care of Trees has upgraded Microsoft Dynamics NAV three times and migrated its data management platform from C-SIDE to Microsoft SQL Server® 2005. To facilitate successful upgrades, the company relies on its long-standing business relationship with Solution Systems and the Enhancement Plan for Microsoft Dynamics NAV, which provides

upgrades, updates, service packs, and regulatory and tax updates for a yearly subscription fee. To provide seamless access to Microsoft Dynamics NAV, the company runs a Citrix solution on its HP ProLiant servers, making Microsoft Dynamics NAV remotely accessible to more than 100 employees across the United States.

When Microsoft Dynamics NAV 5.0 was released in 2007, The Care of Trees IT team quickly considered the value of upgrading from Microsoft Dynamics NAV 4.0 SP3. Says Szoke, “With Microsoft Dynamics NAV, we have continued to add functionality as we need it. When new versions come out, we carefully weigh the deployment cost against the benefits, and then turn to Solution Systems to test the new solution before deploying.”

Solution

The Care of Trees was already in the market for an add-in solution that would enable employees to post information from Microsoft Dynamics NAV into Microsoft Office Word 2003 and Microsoft Office Excel® 2003. Because Microsoft Dynamics NAV 5.0 offered integration with the Microsoft Office system, the company could get the functionality that it needed from a trusted, familiar solution, without the need to source third-party software or work with a new vendor.

With Microsoft Dynamics NAV 5.0, The Care of Trees could also take advantage of inclusive service order-handling features, thus eliminating the need for a complex customization that validated data when posting service orders as service invoices. The Care of Trees also saw the upgrade to Microsoft Dynamics NAV 5.0 as an opportunity to deploy the Fixed Assets module. The Fixed Assets module would eliminate the need to maintain a cumbersome spreadsheet containing thousands of assets. Says Szoke, “Microsoft

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Dynamics NAV 5.0 was such a breakthrough in functionality that upgrading was a no-brainer. While we are used to putting so much custom programming into the system, with Microsoft Dynamics NAV 5.0, we could take a lot of that out.”

Solution Deployment

To reduce risk and eliminate downtime, over the course of two and a half months, Solution Systems worked with The Care of Trees to ensure that the system operated at peak performance. Solution Systems then performed a test upgrade at its own facilities on a replica of the database that The Care of Trees maintains. Two weeks later, The Care of Trees began its upgrade on a Friday night; by Sunday morning, the IT team had the system up and running. Says Szoke, “After we upgraded, we ran several test scripts that we developed and only found one error in a highly customized report that we had made. In 12 years of working with ERP systems, this was by far the smoothest upgrade I have ever experienced.”

Export to Office Word and Office Excel

With Microsoft Dynamics NAV 5.0, The Care of Trees staff members can now export information into Microsoft Office Word. For instance, by accessing a customer record in Microsoft Dynamics NAV and exporting to Office Word, a customer service representative can produce a personalized form letter detailing seasonal tree care offerings. The representative can then add photos or other details, all while ensuring that key information is not left out or incorrect. This integration with Office Word also enables sales representatives to quickly customize proposals for their clients.

Using Office Excel, employees can export customer lists from Microsoft Dynamics NAV, filter the list, and perform a mail merge. Because the data in Office Excel is dynamically linked to Microsoft Dynamics

NAV, it stays up-to-date and relevant as it travels throughout the company.

Synchronization with Office Outlook

With Microsoft Dynamics NAV 5.0, any field form can be synchronized with Microsoft Office Outlook®. For The Care of Trees, this has been particularly important in delivering service appointments to arborists. Explains Szoke, “When we enter a service appointment in Microsoft Dynamics NAV, it automatically shows up in the arborist’s calendar, and it will include the customer’s name and the job site in the subject line.” If the arborist goes into the contact information, he or she can look up the customer’s address and phone number.

Driving Directions and Document Management

Sales representatives and work crews can quickly access and print driving directions between any two locations using Live Search Local, which is integrated with Microsoft Dynamics NAV 5.0. Each user account is associated with an office location, so by clicking an icon next to the job site on a customer record, that user can obtain directions to or from the site. Windows® Internet Explorer® displays the results, which include turn-by-turn driving directions and traffic status.

In future work, The Care of Trees plans to create digital copies of all customer property maps, and then store them in Microsoft Office SharePoint® Server 2007. By creating a link in Microsoft Dynamics NAV 5.0 to the property map in Office SharePoint Server 2007, arborists will have instant access to the information they need, regardless of their location.

Benefits

The Care of Trees enjoys a range of features in Microsoft Dynamics NAV 5.0 that would have otherwise required customizations or

add-in solutions. The solution is now more in line with business needs, driving both adoption and efficiency. Says Szoke, "Microsoft Dynamics NAV 5.0 is what we have always been waiting for. It's exactly what our business needed."

Improve Adoption

With each upgrade to Microsoft Dynamics NAV, The Care of Trees has made ERP functionality relevant and accessible to a broader set of employees. Now that Microsoft Dynamics NAV 5.0 includes configurable integration with the Microsoft Office system and synchronization with Office Outlook, employees can work with current business data in the applications with which they are most comfortable. Even many of the arborists, who had previously avoided using the system, now access account information through service assignments in Office Outlook.

Drive Efficiency and Control

With service order handling in Microsoft Dynamics NAV 5.0, The Care of Trees has eliminated the 3 percent chance of error that was associated with an extra data validation step that was required when posting service orders as service invoices. This means that accountants spend significantly less time rectifying accounts.

The integration of Microsoft Dynamics NAV 5.0 with the Microsoft Office system drives efficiency and ensures the accuracy of information that was otherwise manually entered into Office Word and Office Excel. Says Szoke, "Integration with the Microsoft Office system has added a great deal of efficiency and control to our company. Our staff just has to locate a customer record, click an icon, print the document, and mail it."

Eliminate Redundant Tasks

The addition of the Fixed Assets module in Microsoft Dynamics NAV 5.0 has provided The Care of Trees with the ability to link fixed assets with resources. This link enables the company to be more accurate in its job costing. Says Szoke, "Before Microsoft Dynamics NAV 5.0, our fixed assets were recorded in a monster spreadsheet. Our auditors really didn't appreciate it. Having this information in our ERP system, I imagine the auditing process will go much smoother."

Integration with the Microsoft Office system and synchronization with Office Outlook have led to significant time savings as well. Now that office staff does not have to post service orders to arborists' calendars, Szoke estimates that The Care of Trees saves 30 minutes per district office a day, or 60 hours a week companywide. In addition, the company no longer manages "to-do" lists in two systems, helping to reduce errors.

Since upgrading to Microsoft Dynamics NAV 5.0, The Care of Trees has saved 3,150 hours a year, enabling the company to reallocate those hours to other value-added tasks.

For More Information

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For more information about The Care of Trees products and services, call (847) 459-8400 or visit the Web site at:

www.thecareoftrees.com

For more information about Solution Systems products and services, call (847) 590-3000 or visit the Web site at:

www.solsyst.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 that 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.

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