



McGhee Productivity Solutions

McGhee Productivity Solutions Makes a Wise Move Integrating Microsoft Technologies to Increase Accuracy, Improve Sales and Enhance Strategic Planning

McGhee Productivity Solutions

Organization size: 30

Organization Profile:

Provides Fortune 1000 companies the innovative action-management strategies and products they need to improve executive and employee performance.

Business Situation:

Disparate, nonintegrated ERP, CRM and Web systems leading to time consuming, manual process, inaccurate data and lack of ability to support growth.

Solution:

A fully integrated ERP, CRM and ecommerce system that automates processes, securely stores data and offers deep insight into the business.

Benefits:

- Increased accuracy
- Increased sales
- Enhanced strategic planning

Software/Services:

- Microsoft Dynamics NAV
- Microsoft Dynamics CRM
- Microsoft .NET for ecommerce

Vertical Industries:

Process Improvement/Consulting

Country/Region: Denver, Colorado

Partner: InspireSmart Solutions

Take Back Your Life!™ is the mantra that McGhee Productivity Solutions (MPS) not only instills in its clients, but lives by as well. Specializing in providing consulting services and products that maximize technology investments and leverage an organization's best assets (its people) McGhee enables its client's employees to become strategic workers, not reactive ones, with improved job satisfaction. It is not uncommon for a whole department in a large company to go from 60 hour weeks to 40 hours weeks while completing the same amount of work and with less stress – due to better work/life balance! Customers who work with McGhee have reported as much as an 81% decrease in e mails being held in the inbox and 61% decrease in interruptions per day!

Increased demand for their services and solutions pushed McGhee's technology infrastructure to buckle under the volume, to the point that it began impeding their own ability to be as productive as they knew they could be. Customer data was all on local drives, meaning the potential loss of a vast amount of valuable information if a laptop went down. Capturing leads off of their website was not possible. Their financial system was completely separate from their ecommerce, resulting in both manual and time intensive processes that were anything but productive.

McGhee Productivity Solutions, an independent innovator of solutions that help other companies become more successful, use their own solutions to run their company and assist their own employees to complete work in an efficient manner. This approach offers the organization much valued productivity enhancements that lead to work/life balance; success close to home. Over the years, McGhee grew and was able to offer clients more. The demand for their productivity offerings increased at an exponential rate, to the point that that their technology systems began impeding both growth and success. Employees were able to do the work, but their technology systems could not keep up! Taking their own advice, of maximizing technology investments to leverage their best assets, their people, they moved forward to improve their technology systems.

MS Dynamics is a solution of choice and InspireSmart is a local partner of choice due to their high degree of integrity, creativity and knowledge of MS Dynamics."

Phil Marks, XXX

With the help of Denver-based Microsoft partner InspireSmart Solutions, McGhee implemented Microsoft Dynamics NAV, Microsoft Dynamics CRM and an ecommerce system based on Microsoft .NET technology. The outcome was more accurate data, improved strategic planning, increases in sales and a system capable of keeping up with a rapid rate of growth. As a result, McGhee Productivity Solutions wisely 'took back their own life' and set a course for continued growth and success!

Situation:

Under their prior environment, McGhee was using disparate systems and applications, pieced together that were used but were disconnected and failed talk to each other. Large amounts of information was stored on local drives, different website databases and in Excel spreadsheets. The software program (QuickBooks) holding financial data was separate and not integrated with their web or ecommerce, making it difficult to track incoming orders and link them to cost and revenue data. The CRM (Customer Relationship Management) system was based on customized spreadsheets and stored on local drives, making it difficult for customer service and sales to properly follow-up on and take care of leads and customers. This led to not only losses in potential sales going forward but also compromised customer care. Finally, McGhee's homegrown ecommerce engine did not allow for new leads to be captured, meaning that all of the incoming data had to be culled manually to consolidate information. All in all, the current technology posed more of a hindrance to McGhee's ability to manage day-to-day operations and plans for future growth. In order to meet its vision for expansion, it was apparent their data needed to work together, seamlessly and the data had to be centralized. It was time for a change!



Solution:

McGhee was looking for ecommerce integration with financial and customer management workflows. They needed a highly customizable CRM solution to be able to track opportunities, quotes and orders to forecast sales and to integrate McGhee’s Intellectual Property. In addition, they needed an ecommerce solution to allow for eLearning and sales automation, in order to be able to sell their next book. Requirements for Microsoft Dynamics NAV

included being able to replace the existing QuickBooks software with a more robust solution that could handle large amounts of transactions, both online and manual, and be able to efficiently manage financial data and reporting. Dynamics NAV also needed to have remote hosting capability at a secure data center. For CRM the requirement was to be able to customize data, import multiple years worth of sales statistics and client information and to streamline workflows; handling leads and accounts efficiently. On the ecommerce front, McGhee wanted to migrate from their old web site, implement fully scalable ecommerce, re-write content (50 pages) and make the site more user friendly. All systems had to be able to talk to one another seamlessly, in order to decrease manual tasks and create efficiencies through automation.

To equip their entire organization (sales, management, finance, customer care, etc...) with the tools necessary to take advantage of their productivity processes in place, McGhee chose to work with Denver-based Microsoft partner InspireSmart. McGhee spent 6 weeks researching nationwide vendors with experience working with companies like themselves; generating from 2-5 million in revenue annually. The goal was to find a Microsoft partner, due to McGhee’s strong ties to Microsoft, to assist them in automating and centralizing processes using technologies in Finance, CRM and ecommerce. After a thorough search, InspireSmart was chosen. The strong suite of Microsoft Dynamics NAV and Microsoft .NET, for accounting and ecommerce integration, and Microsoft Dynamics CRM, for powerful customer care integration, were selected as a complete solution.

Benefits:

McGhee Productivity Solutions implemented the chosen solutions and experienced immediate benefits in the accuracy of the data flowing from their Web into their Finance and CRM systems, an increase in sales and improved strategic planning due to greater insight!

Increased Accuracy

With data flowing directly from the .NET based ecommerce system into the Dynamics CRM and Dynamics NAV systems, fewer manual interventions are necessary. Orders and inquiries keyed into the Web automatically populate NAV and CRM, without any manual keying required. Data is transferred more quickly, is more accurate and thus more reliable. Information is securely stored on the integrated Web, NAV and CRM servers, further creating confidence in overall safety and accuracy.

InspireSmart worked closely with McGhee to provide solutions that were well –thought out – and at many times – ingenious. They established a trust with us that we can count on now and in the future.”

Increase in sales

Automating sales processes via the Web, through integrated .NET ecommerce and Microsoft Dynamics NAV has helped to increase overall sales. People no longer have to manually rekey data, entered on the Web, into the finance system. Orders flow directly from the Web, and post properly to Dynamics NAV. Product, quantity, cost, revenue and other pertinent data is securely and automatically transmitted into the NAV system, allowing for McGhee personnel to spend more time selling and less time manually managing the process.

Improved strategic planning

Having a CRM system where all client information is centralized and sales statistics can be analyzed has tremendous value. “We now know what industries, what territories we do well in and where to focus” says Phil Marks, Director of Technology. “We track monthly sales and goals for our consultants now. Having this data greatly enhances our ability to strategically plan.” All in all, the new integrated systems enable McGhee to be more proactive in their planning due to timely and enhanced insight into all facets of their business.

Summary:

Now that McGhee has the proper technology in place they can maximize efficiencies using their own productivity solutions. They plan to efficiently run the business using competent data. With Microsoft Dynamics NAV and CRM, and a Microsoft .NET based ecommerce system, McGhee knows they are using the best industry standards, allowing them to streamline their infrastructure. The partnership with InspireSmart Solutions and Microsoft allows them to do just that. Comments Phil Marks, “Keeping things as simple with technology is a big goal. We don’t want to be overwhelmed with technology. We want to use it WISELY!”