

Consumer Services Company – ERP Case Study

Key Takeaways:

- A \$512 million Consumer Services Co. in the Midwest engaged RubinBrown to direct and guide them through business requirements definition, ERP evaluation, ERP comparison, ERP project management, and ERP change management.
- Their two current ERP systems (one home grown and the other a non-supported legacy ERP system) were outdated and deemed unable to meet the needs of the company or scale with growth goals.
- RubinBrown evaluated their current systems and processes and assisted the company through their ERP selection process. The company chose Microsoft Dynamics AX 2012 and a new HCM (Human Capital Management) software (ADP).
- The company experienced business transformation involving process changes spanning Accounting, Customer Relationship Management (CRM), Sales and Distribution, Manufacturing, Inventory Management, and Human Resources.

Client:

A \$512 million family-owned, residential and commercial cleaning services company in the Midwest, made up of 5,000 employees, operating in 49 states with over 275 franchises and company-owned locations.

Challenge:

The project was driven by the client's concern that its current Enterprise Resource Planning (ERP) software had become outdated and was no longer meeting their needs efficiently enough to remain competitive in today's market.

The company was preparing for rapid growth that would increase revenue and lead to international expansion and recognition. Their current manual processes and disparate systems were difficult to maintain and could not meet the company's goals for the future. They knew they needed to bring in a consulting firm with knowledge of ERP to help select a multi-site, modern ERP platform and guide them to a successful ERP go-live.

Actions:

Technology improvements must match business requirements to support the organization's business goals. To that point, the project was defined as a Business Process Optimization project. Fifteen optimization suggestions were found and implemented, including replacing their two old ERP systems.

An ERP evaluation was conducted to determine how various software programs could assist the company in all areas of their business processes. The evaluation examined how each software could enhance the company's operations and improve the company's practices.

The ERP solution chosen delivered the following key business objectives:

- Increased productivity and efficiency across the company
- Provided real time visibility for leadership and end users
- Met or exceeded profit growth objectives
- Maintained an efficient operating model
- Provided an enhanced front line employee tool

The Business Process Review and ERP evaluation began in early 2012 and implementation of both the ERP and HCM solution were completed by the end of 2014.

Solution:

The client selected Microsoft Dynamics AX 2012 and ADP HCM as their enterprise software solutions. These were implemented at their headquarters, one manufacturing facility in the U.S., and over 275 branches, both company-owned and franchisees. Both implementations were delivered on time and on budget with the desired future state improvements.

Results:

The company's investment in new technologies provided much-needed tools and functionality for internal and external stakeholders. In addition, incorporation of policies and processes into automated workflows did more effectively provide for data management, improved productivity and efficiency, and retention of critical human skills. Specifically, the following were requirements delivered by the new applications:

- Single source of the truth: Unlike their previous environment, the new environment had all of their data in a single system, thus ensuring they were looking at the same data in all departments.
- Real-time, up-to-date information: Because their data was virtually entered in real time, they had access to the data almost immediately versus the old systems which could be days before they could see what was going on in the business.
- Easy-to-use, touch-based interface: The old systems were still "green screen" whereas the new environment was a Windows-based, user friendly, and intuitive solution. The existing mobile application ran on a very small screen with a dated interface. The new field solution provided a far more intuitive user experience for field techs, resulting in fewer errors, less frustration, and a shorter learning curve.