Active Tree Case Study

Integrated Solution Bears Fruit For Active Tree Services

Active Tree Services is Australia's largest vegetation management company. For more than 30 years it has been providing arboriculture services, power line vegetation management, vegetation recycling and emergency response services to clients such as utilities and local governments around Australia. The company employs over 570 full time staff and 300 contractors, maintains a substantial fleet of specialist equipment, and in 2010, reported annual revenues in excess of $100 million.

Problem

In 2007, Active Tree Services' information systems needed a revamp. The company's two most critical systems – finance and customer relationship management (CRM) – were aging, their functionality was limited and both offered only the most basic form of integration. Sharing data between systems was difficult. Obtaining meaningful financial reports was even more so. It was time for an upgrade.

Justin Sheppherd, Active Tree Services' Chief Information Officer (CIO) led the search for a replacement solution capable of managing Active Tree Services' entire business. He established a number of project goals including:

– faster, more accurate management reporting and financial information

– a reduction in the manual re-keying of data

– an improved ability to analyse management information while maintaining data integrity

– increased user acceptance of the core system to ensure uniformity of use across the business

– a standardised platform to enhance the ability of IT to support the applications

In addition, there was one existing application that Sheppherd was determined to maintain and which would need to be integrated into the overall solution. Since 2006 the company had been using Microsoft SharePoint Services to provide document management and aid collaboration on projects across the enterprise and between branches. The software was well accepted by the company's 200 IT users and Sheppherd could see great potential to develop more services using the software.

At a glance

Business Objective

To create an integrated, whole-of-business information system with comprehensive financial, CRM [customer relationship management] and collaboration capabilities.

Solution

- Microsoft Dynamics GP
- Microsoft Dynamics CRM
- Microsoft Office SharePoint Server
- Microsoft SQL Server
- Microsoft Reporting Services
- Scribe Insight

Business Benefits

- Integrated systems have reduced manual re-keying and are delivering greater data accuracy
- Improved timeliness and flexibility in management and financial reporting
- Gains through efficiencies and better management information are estimated to be valued at $100,000 per annum

Implementation Partner

Professional Advantage

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Solution

Sheppherd evaluated a variety of CRM solutions and financial packages. He says, "We looked at all the major ERP [enterprise resource planning] vendors. It wasn't until we saw how well Microsoft Dynamics CRM and Microsoft Dynamics GP worked with SQL Server and SharePoint that it all fell into place. With the help of Scribe as an integration tool, we could see how it would work together, giving us the flexibility we needed while maintaining a solid environment for the ERP."

The evaluation team – comprising operations staff, administrative staff, management and IT – all agreed. "Ultimately the decision came down to the fact that there was an understanding that flexibility and scalability were key. Our business has fairly unique demands. We contract to the major power authorities and much of what we do is driven by the customer. Every power authority has its own way of wanting to interact with vendors and it's essential that we have the ability to quickly change to adapt to their demands. This flows through the entire business, from operations through to invoicing and data collection," Sheppherd notes.

With choice of software settled Sheppherd approached Microsoft for advice regarding an implementation partner. Microsoft recommended Professional Advantage and after a couple of meetings and a review of previous software implementations, Sheppherd agreed. "Professional Advantage had the reputation, experience and were expert in the three core pieces of this project – Microsoft Dynamics CRM, Microsoft Dynamics GP and Scribe Insight," Sheppherd says.

Given the scope of the implementation, deployment was divided into stages. The first application to go live was Microsoft Dynamics GP. This forms the company's core financial system and includes cash book, payables, receivables and fixed assets.

Six months later, Microsoft Dynamics CRM followed. Far more than a simple contact database, CRM is being used by Active Tree Services to provide sales process management, training and certification management, insurance notification and audit management.

"CRM is used as our invoicing front end by administrative staff. It's used to record and report OH&S [occupational health and safety] data such as audits, injuries and incidents and it manages staff qualifications. It's also integrated into our HR and payroll system, so all employee information flows from HR into the CRM. We've really used CRM a lot because it is a web-delivered system and this makes it great for our satellite offices," Sheppherd adds.
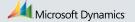
Next, Professional Advantage integrated Microsoft Office SharePoint Server with the CRM and financial systems. All of the services previously developed in SharePoint have been retained and new functionality has been added. The portal includes a time sheet processing system; it's used by HR to advertise positions available; and by Finance to keep staff informed of corporate news.

Sheppherd explains, "It is very important to us to have a portal where we can expose all the business information to management and operations staff. SharePoint and Reporting Services are doing this very effectively for us. We can pull information from Microsoft Dynamics GP, payroll and various other operational SQL databases or from the CRM system and through SharePoint, provide a single, secure place to access all that information on the Web."

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Benefits

A year after completion of the project, Sheppherd says, "We've achieved significant savings in transaction processing time and costs. There have been improvements in efficiency and in the information available to us to help manage costs. These benefits are estimated to be valued in the vicinity of $100,000 per annum. However the impact on the company's culture is significant and cannot be quantified."

Simple activities such as invoicing have dramatically improved. Invoices are produced with far less effort and fewer errors. Users are happier now that they are no longer spending as much time re-keying data. Management has been able to reduce off-system processes and introduce greater standardisation across the business.

"The other outcome of this is that our value to our customers has increased," Sheppherd notes. "We are able to provide timely, accurate information on demand," he adds. Self-service reporting means that staff are spending less time gathering data and more time providing value."

Future

For Sheppherd and his team, one of the most important aspects of Professional Advantage's implementation was the knowledge transfer offered to Active Tree Services staff.

"Professional Advantage provided mentoring so that we are able to maintain and modify the systems ourselves," Sheppherd says. Recently, for example, the IT team developed a mobile data collection system to help manage and report on the company's specialised fleet of motor vehicles. Data about truck movements is recorded then fed into the company's software systems for analysis and next-day publishing via SharePoint. The information is enabling management to better manage crews, analyse breakdown data, understand productivity trends and the reasons for time lost.

Summing up the project, Sheppherd says, "Microsoft Dynamics has provided a solid platform for transaction processing while SharePoint gives us a compelling environment for employees to interact with each other and has brought the company closer together. Professional Advantage managed a very smooth implementation with everything delivered on time and on budget. Professional Advantage was also instrumental in helping the business to realise the scope of what could be achieved with Microsoft Dynamics CRM. They've enabled us to pick up the ball and run with it," Sheppherd concludes.

"For me one of the biggest surprises was that every practical CEO expects IT system replacements to go well over time and well over budget and be painful for the whole business. This was not."

Brendan Murphy
Chief Executive Officer

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