



CLIENT SOLUTION CASE STUDY

Modernizing Business Processes and Enabling Remote Work at Large Insurance Company



MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

Background

A large insurance company embarked on a journey to modernize its business systems and processes. With the help of Velosio, the company successfully transitioned to Microsoft Teams for both internal communication and their external phone systems and implemented Microsoft Dynamics 365 Business Central (BC) for financial management.

The Need for Anywhere, Anytime Access

The insurance company had been using a local phone system and legacy server-based software, Dynamics SL (SL), for several years. As they made the shift to remote work during the Covid-19 pandemic, they were able to function, but it was not an easy process.

To access their SL environment, employees either had to come to the office, or VPN into the network. They also faced the challenge of determining how they would answer phone calls when no one was physically in the office.

Recognizing the limitations of their outdated server infrastructure, the company made a strategic decision to migrate to the cloud. By embracing cloud technology, the company achieved enhanced scalability, accessibility, and security. This shift allowed employees to access critical information and collaborate from anywhere, ensuring uninterrupted workflow even in remote work scenarios.

OVERVIEW

Software Solutions:

- Dynamics 365 Business Central
- Microsoft Teams Phone

Challenges:

- Hindered by Legacy software
- Inability to work from anywhere, anytime
- Financial Management Constraints

Benefits:

- Enhanced scalability, accessibility, and security
- Streamlined processes
- Redefined work culture

The company migrated 40 users to Microsoft Teams Phone, eliminating the need for landlines and phone hardware. Now, all employees can answer incoming calls, or make external calls, directly from their computer or the Teams app anywhere in the world. Conference rooms were transformed with cutting-edge equipment for conference calls that take place through Teams.

Streamlined Processes

To streamline their financial processes and enhance collaboration, the company implemented Dynamics 365 Business Central (BC). This full implementation included modules such as General Ledger (GL), Accounts Payable (AP), and Banking, tailored to meet the specific requirements of the company. By gathering and analyzing their unique needs, the configuration of BC was optimized for seamless integration into their existing workflow.

One of the critical aspects of this implementation was the successful transfer of historical data from SL to BC. This ensured continuity of financial operations and allowed the company to leverage their rich data history for informed decision-making. The migration process was meticulously executed, guaranteeing the integrity and accuracy of the transferred information.

To empower employees and maximize the benefits of the new system, comprehensive training and support was provided prior to go-live of the system. Velosio's experts guided the employees through the functionalities of BC, providing hands-on training sessions that equipped the workforce with the knowledge and confidence to utilize the software effectively. The company also adopted Mekorma for e-check signatures, improving efficiency and security in financial transactions and Greenshades for payroll and tax.



Benefits

By implementing Microsoft Teams and Dynamics 365 BC, the company redefined their work culture and harnessed the power of modern technology. The benefits reaped from this transformation have been significant, impacting various aspects of their operations.

One of the primary advantages derived from this digital overhaul is enhanced remote work capabilities. The adoption of Microsoft Teams has enabled employees to work from anywhere. This newfound flexibility has eliminated the need for physical presence or reliance on VPN access, allowing for increased productivity and improved work-life balance.

Additionally, the implementation of Dynamics 365 BC has streamlined the company's financial management processes. The incorporation of modules such as General Ledger (GL), Accounts Payable (AP), and Banking has resulted in more efficient and accurate financial operations. Tasks that were once time-consuming and prone to errors have now been automated, enabling employees to focus on value-added activities.

Another notable advantage is the improved payroll management offered by BC. With the payroll module from Greenshades, the company gained the ability to process payroll remotely. Moreover, employees now have control over their personal information, such as making changes and accessing pay stubs. This self-service approach has reduced administrative burdens and improved employee satisfaction.

Throughout this transformative journey, the company benefited from the dedicated support and comprehensive training provided by Velosio, their trusted partner. The responsive support team and their knowledgeable consultant played a pivotal role in ensuring a seamless transition. Regular training sessions equipped the company's staff with the necessary skills to leverage the new systems effectively.

The positive impact of this digital transformation has been tangible for the organization. By embracing Microsoft Teams and Dynamics 365 BC, the company has unlocked new levels of efficiency, empowered their employees, and adapted to the demands of a rapidly changing business landscape. This successful implementation serves as a testament to the organization's commitment to innovation and continuous improvement.

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