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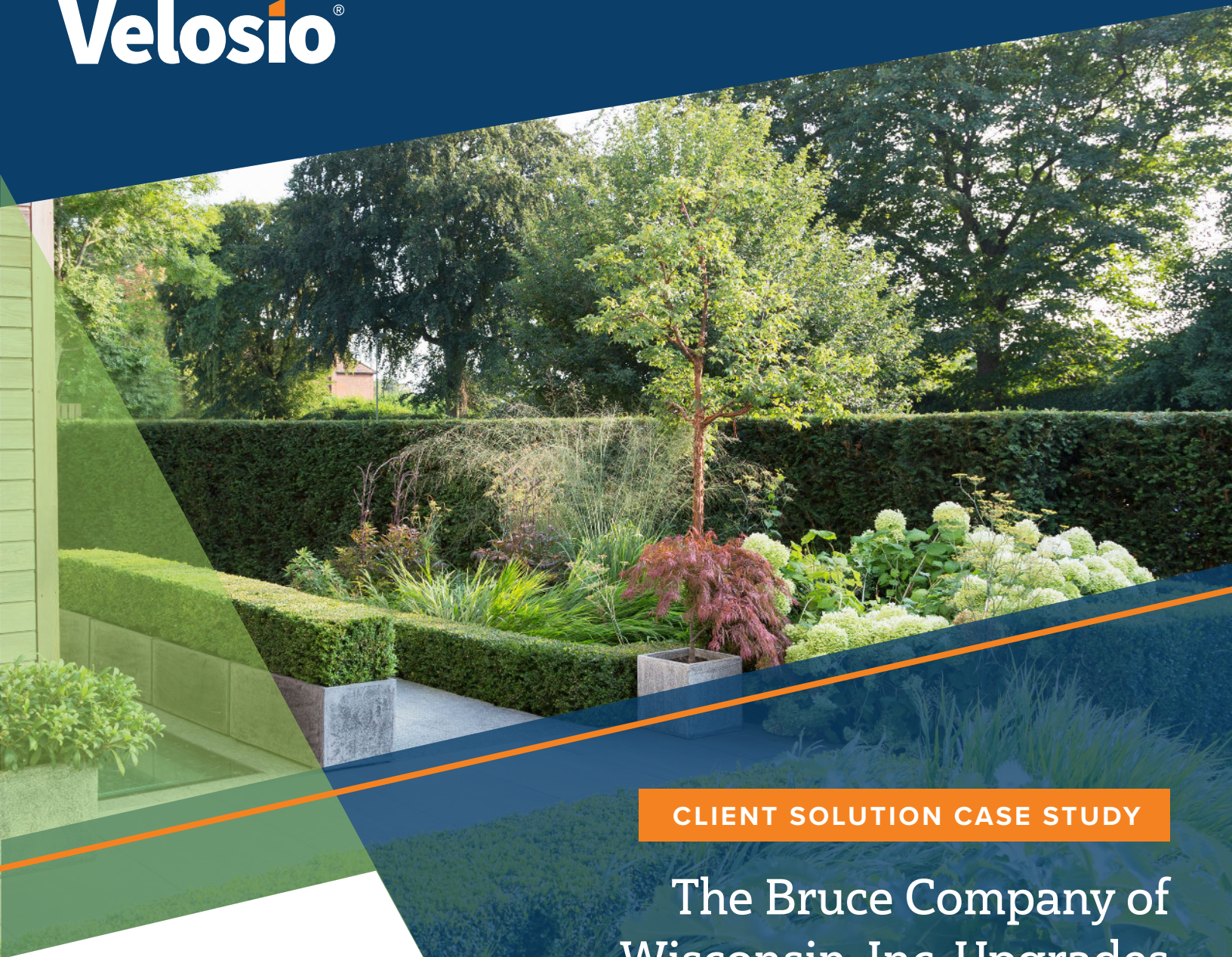
The Bruce Company of Wisconsin, Inc. Upgrades to Microsoft Dynamics 365 Business Central for its Operations Heartbeat

the bruce company
OF WISCONSIN INC.

MICROSOFT DYNAMICS 365
BUSINESS CENTRAL

Overview

Software Solutions:

- Microsoft Dynamics 365 Business Central

Challenges:

- Running unsupported, 15-year-old software
- Inefficient Finance processes
- Insight constraints

Benefits:

- User friendly, intuitive, and interactive app
- Cut down on customizations and unused reports in upgraded system
- More efficient, automated processes

Company Overview:

The Bruce Company of Wisconsin, Inc., provides landscape services for both residential and commercial customers in southern Wisconsin.

Industry: Lawn & Garden Planning/Maintenance
Employees: 600
Headquarters: Middleton, WI

Background

The Bruce Company of Wisconsin, Inc., was formed by Leland Bruce in 1952 – when he borrowed a tractor to plow his neighbors' gardens to earn enough money to travel to California for the National Boy Scout Jamboree. From these beginnings, The Bruce Company has steadily grown and is now one of the largest landscape contractors in the United States. The Bruce Company serves residential and commercial customers for their landscaping and snow removal needs and has a retail garden center.

The Bruce Company was running Microsoft Dynamics NAV 2009 and knew for quite a while that it was time to upgrade the aging, unsupported software. Because of its different business divisions, all managed with several homegrown internal systems, NAV was heavily customized.

"We put off the upgrade as long as we could, but finally budgeted for it in 2023," says IT Director Jeff Schlieckau. "For us, another solution besides [Microsoft Dynamics 365 Business Central] was not an option. We wouldn't have the time to spin up a brand-new system and switch, and we were comfortable with the technology and knew what Business Central capabilities were, so we decided to forge ahead with the upgrade," continues Schlieckau.

Solution

The Bruce Company partnered with Velosio based on their history of working together on Microsoft solutions. "We didn't consider another partner other than Velosio because we knew they would be best equipped to pivot to our upgrade needs," comments Schlieckau. The plan was to upgrade NAV to Microsoft Dynamics 365 Business Central for core financial and back office needs on premises so that it could be integrated with The Bruce Company's 7-8 internally developed systems. "All of these subsystems are designed to be consumers of the master data from BC - in some cases they contribute to it, but Business Central is the heartbeat of it," says Schlieckau. Internal systems serve the different areas of the business, including snow removal, landscape services, the retail store, interior plant installs and maintenance, equipment maintenance and repair, sales and quoting, customer CRM database, timekeeping, fleet management, and job work orders. "Our business is complex, necessitating these custom solutions along with an on-premises instance of BC," explains Schlieckau. The Bruce Company cut down on customizations where possible, opting to change their processes to fit with the out of the box solution. They also installed a utility to determine which reports were being run and which wouldn't need to be carried over to the new system to save money (reports are often the costliest part of an upgrade). "This was a great suggestion from Velosio," comments Schlieckau.

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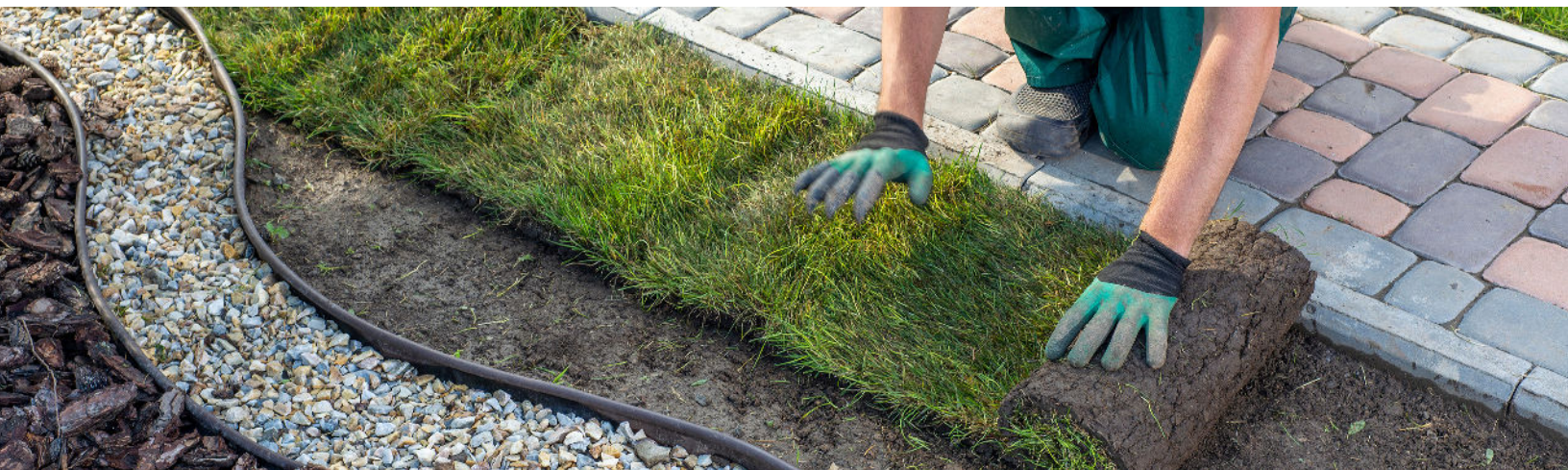
Implementation and Training

The Bruce Company's upgrade project came in 100 hours under budget and nearly on time. "Velosio developed an estimated price for the whole project up front, which was pretty accurate," says Schlieckau. "Going into it, I knew the estimate was going to be pretty close, understanding the scope of work. And then it was, you know, monitor and watch things as they happened and handle the unexpected things that come up," adds Schlieckau. "I was pleased with the overall project organization from Velosio. Everyone was extremely knowledgeable and very reactive to all aspects of the project. John, Kiran and Matt especially get high grades for everything that was done in a timely fashion. Everyone else on the team also deserves high praise for stepping in and helping with onboarding and training. I give the upgrade an A. We were live the day after the cutover, which a lot of people cannot always say - it can take days or weeks after cutover until you're live," adds Schlieckau.

The Bruce Company handled training in an interesting way, coupling it with system testing. The Bruce Company developed four power users representing four different areas of the business who tested the system as they trained. They then trained staff in their respective areas in a train-the-trainer approach. User acceptance is high. "BC is such a drastic improvement that it overshadowed anything that would be negative coming from the end users," says Schlieckau.

nds Microsoft Dynamics 365 Business C er 'Since BC is browser-based, the multiple ving to open up a second and third instance of the oful, as well as being able to click off and go back d filtering and the ability to search is helpful," says Schlieckau. These were all immediate gains, along with more interactive reports which are integrated with Excel. If you have data in a grid, you can share that in Excel right away and not have to fiddle around with the file export with ugly XML formatted Excel data from NAV. The Business Central stuff is much cleaner," adds Schlieckau. The Bruce Company is seeing productivity gains across the board. "There are several things in the Finance world that saves a ton of time," says Schlieckau. "Their ability to edit a posted invoice for example, and not having to do a manual credit memos and then reissue the invoice. And the ability to get to the job planning line data without having to go through the tasks in the old version is helpful," adds Schlieckau. "I'd tell other companies who are still on NAV not to wait - get it done because BC gets you up on the most recent things like the mobile app or ACH payments or the new things that are going to be added in future releases," says Schlieckau.

Benefits Roundup

- ✅ Productivity gains across the organization
- ✅ Bank reconciliation faster and more accurate
- ✅ Easy access to mobile app
- ✅ Faster navigation
- ✅ Simplified invoicing process
- ✅ High user acceptance
- ✅ Interactive reporting with seamless integration to Excel
- ✅ Finance saving time on invoicing

Future Plans

The Bruce Company will consider adding Power BI to its solution to meet future business needs. "The answer is yes to anything that can help us analyze more data," says Schlieckau. "We have our own data mart through SQL, and I would be happy to give that up and use Power BI pending training for users because we have all the data there. There are lots of things I would do to fixed assets too since that functionality is much more robust in BC. For example, tracking equipment maintenance," concludes Schlieckau.

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