

# RG Connect 2015

**Smarter. Faster. Together.**



Best Practices/Success Stories of Dynamics GP  
with our Distinguished Customer Panel –  
Liz York, Jackie Yip and Todd Bowlsby

Presented by: Holly Miller-Jones & Craig Mosier

# Guest Panelist, Jackie Yip



Jackie is a Senior Systems Analyst for Fire District #37, Covington and Kent Fire Departments.

Jackie project manages internal process improvement for their applications, systems, and databases. This includes Dynamics GP, Fire Records Management, Fire Protection Systems, Accreditation, Pre-Fire Program, Financials, Asset Management and Inventory. Jackie has 18 years of experience in her field.

# *Guest Panelist, Liz York*



For 90 years, Dennis Uniform has been the benchmark for school uniforms. Third-generation family owned and operated, they serve over 2000 top schools nationwide. Uniforms are manufactured in their Portland, Oregon factory.

As Controller of Dennis Uniform, Liz leads the Finance team and is also responsible for the business processes behind the system, including automation projects. Liz brings 10+ years of financial experience and leadership.

# *Guest Consultant Panelist, Todd Bowlsby*



- With 15 years as an Accountant and CFO, along with 5 years as an IT Director, Todd has knowledge of accounting practices and principles, Todd is able to help clients improve business processes, overcome challenges during growth and connect business information.
- He specializes in the healthcare, life sciences, manufacturing, non-profit, distribution, property management, retail and professional services industries.

# ***Panel Discussion -***

- **Business Challenge Scenarios:**
  - **Training**
  - **Multiple Disparate Systems**
  - **Network/System Stability**
  - **Payment Automation**
  - **Scheduling Challenges**
  - **Data Integrity and Redundancy Issues**
  - **Automation of Employee Information**
- **Consultant Perspective**
  - **Disparate Systems**
  - **Ability to Scale Platform**
  - **Need for Consolidated Reporting**

# ***Questions & Answers*** *(hopefully)*

- **Other areas to help support you with Best Practices:**
  - **GPUUG WA Chapter**
  - **Convergence 2016**
  - **Operational Reviews (handout)**





*Thank you!*

## ***Panel Goals -***

- **Business challenge**
- **Steps to solution**
- **Impacts on business**
- **What did your business gain?**
- **What did you learn?**
- **What changes were implemented?**



# *Training questions – both*

- **Why was training necessary for your team?**
- **What was the chosen course of action?  
What type of training was pursued?**
- **What impact was there on your company after training? An increase in productivity?**
- **What lessons did you learn as a result of the training?**

# ***Integration questions – both***

- **You had a number of unconnected environments. The POS and accounting system, for example. We discussed what you would like to have happen. Tell me about the result of those discussions?**
- **What impact has this had on Dennis Uniform?**
- **By integrating the disparate systems, what did Dennis Uniform gain?**
- **What were the lessons learned from this situation?**

# *Network/System Stability*

## *questions* (Server Care Plan) – Liz only

- **To ensure you have a stable system and access any time you need, what steps have to take to make sure this happens?**
- **What would happen if you didn't have those things? What would be the business impact?**
- **What lessons have you learned in the process?**
- **What was the outcome?**

# *Payment Automation – both*

- **You came to us with some issues in your AP processing. Tell me about what was happening?**
- **What solution was implemented to help the situation?**
- **What impact did this have for your company?**
- **What did Dennis Uniform gain from implementing a solution?**

# ***Data Integrity and Redundancy Issues*** *(copy/paste tools)*

- **You were hand enter data from Excel spreadsheets, which can be time consuming and presents challenges with accuracy. Tell me about the solution that was implemented?**
- **What was the impact?**
- **Can you quantify the results?**
- **What was gained?**

# Jackie

## **Automation of Employee Information**

- **Employee earning statement:**
  - **We have done some customization to disseminate information to your employees, in particular their earning statements. Tell us a little about that and how its has been?**
- **ACA – with regard to ACA Federally mandated employer tracking of employee information. What has your org done to make sure of compliance?**
  - **Talk about steps your taken to this point and where you are now.**
- **Year-end State Reporting**
- **IS there anything else you'd like to share around reporting?**