

# 9

## CREATIVE WAYS

Microsoft Dynamics is Helping  
Businesses Pivot During Crisis



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# 9 Creative Ways Microsoft Dynamics is Helping Businesses Pivot During Crisis

During times of uncertainty, innovation is crucial to survival. Businesses today are facing upheaval on so many levels—state lockdowns, closed offices, slashed revenue, no childcare for workers—that it's hard even to know where to begin. Such challenges require innovation at the highest levels and execution that leaves nothing to chance.

Organizations are looking to Microsoft Partners to help them pivot quickly by combining the power of Microsoft Dynamics ERP and CRM with their years of industry experience. Dynamics Partners are building pathways through uncharted territory by bringing innovative approaches to problems no one expected, all while working on the fly to stabilize, reopen and respond during an unprecedented crisis.

In this eBook, we share how organizations are relying on their Dynamics Partners to solve challenges and build on opportunity creatively. We hope you will find ideas to help you navigate your business through troubled times.

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*"Efficiency is the most important. You want a system that is flexible and efficient, not only one that allows you to work remotely, but allows you to be able to change the system as needed on the fly to add more business automation steps, get the new reports you need and more. Gone are the days when you relied on a programmer to do that kind of thing. Nobody has the time for that now."*

– CAL Business Solutions

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# 1

## Enable remote workforce productivity

The overnight switch to work from home has been a crash course in digital collaboration for many organizations. Employees accustomed to collaborating in person have had to adjust quickly and get their teams up to speed in a foreign environment. And in this time of turmoil, the need for innovative thinking built on team collaboration and idea-sharing has never been greater.

By combining the collaboration power of Microsoft Teams with Dynamics ERP and CRM, Microsoft Partners are helping remote teams remain productive and efficient with open communication and real-time collaboration.

### Ease the transition to remote collaboration

The transition from in-office to remote workforce is easier when your teams can share information effortlessly. Through Microsoft Teams and Dynamics, business groups can share files and customer information just as they would in the office. To help employees continue to feel part of the team, your organization can:

- **Use video-technology during meetings to create a virtual conference room that mimics in-person meetings**
- **Collaborate at scale, not only on a single Dynamics record (such as a sales opportunity), but also on multiple records with a Dynamics view**
- **Work together with customers and colleagues across functions. Access, share and edit Word docs, PowerPoint and Excel files in real-time**

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*“Islands of information are not good for any business, but especially when teams are disconnected. You waste time searching for information, and you make decisions without all the facts. You need one single version of the truth that is easy to access.”*

– CAL Business Solutions

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# 2

## Protect cash flow with tighter controls

Managing cash flow is always important, but during uncertain times maintaining liquidity is the key to survival. Microsoft Dynamics ERP provides the insight and tools to tighten cash flow controls. With clear visibility into payables and receivables, finance teams can work with vendors and customers to stabilize and predict cash flow.

Microsoft Dynamics Partners are helping companies automate the accounts receivable and accounts payable functions to provide clear and timely visibility into cash position. Automation also frees up the accounting team, giving them more time to work proactively with top priority customers and vendors.

### Automate receivables workflow

By automating invoicing and payment collection, you can reduce the time it takes to get paid and to manage collections. Microsoft Dynamics ERP can support automated receivables workflows to:

- **Send out invoices quickly, including customer-specific payment terms**
- **Accept electronic payments, including SafePay, EFT and ACH**
- **Provide insight into customer history to give accounting personnel perspective**

### Centralize accounts payable

Microsoft Dynamics can provide centralized management of invoices—paper and digital—driving automated workflows to guide the review and approval process. Centralized accounts payable allows your team to:

- **Have full visibility into the entire accounts payable process**
- **Work proactively with vendors to extend terms and adjust purchases based on new forecasts**
- **Impose minimums or maximums for purchase orders to ensure margins are preserved**



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*“A strong ERP system gives you many ways to analyze the habits of your clients, so you can quickly see which ones are slow to pay and keep an attentive eye on work done for them.”*

– CAL Business Solutions

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# 3

## Remodel processes through automated workflows

Even with the recent push for digital transformation, many manual processes remain ingrained in business cultures. Every company has some cumbersome processes that have been hard to let go—until now. Automation, through Microsoft Dynamics ERP and CRM, can streamline the most complex processes to support productivity for teams working from their living rooms.

Microsoft Dynamics Partners connect data and systems to bridge departmental silos and drive common business processes through workflows. Automation helps to ensure consistent service delivery and guides standard practices, like approvals.

### Innovative productivity solutions

While working remotely may force the need to automate processes, the transformation can deliver benefits that will last beyond the current crisis. The real value of Microsoft Dynamics ERP and CRM is delivered through the expertise of Partners who know how to bring solutions together to drive efficient, practical solutions, such as:

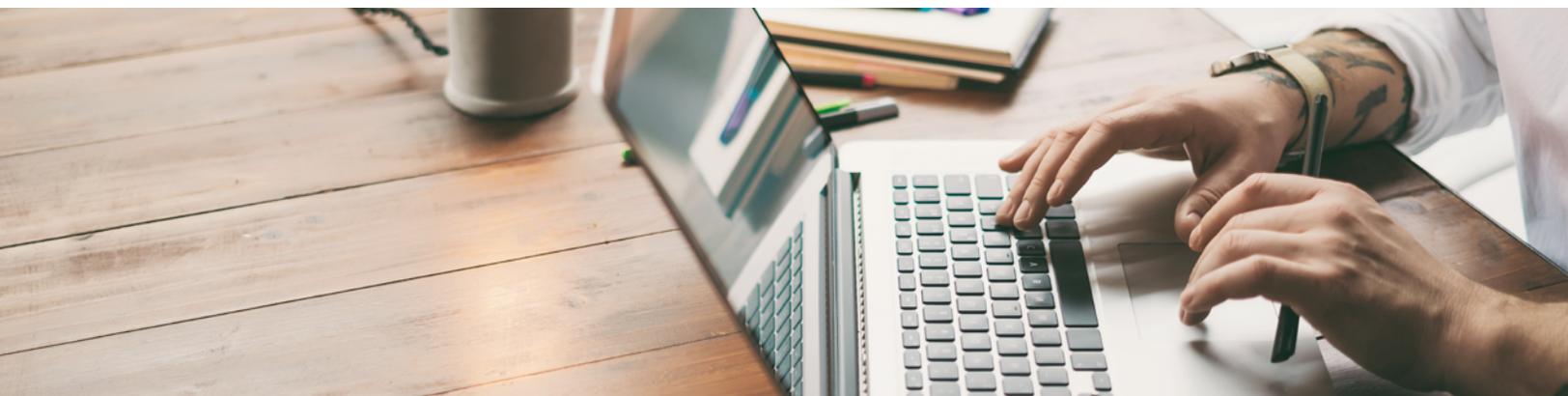
- **Assigning and tracking tasks to keep remotely-managed projects on time and on budget**
- **Consolidating purchasing across business units to optimize inventory and take full advantage of vendor terms**
- **Automating approval processes—for everything from credit limit increases to employee expense reports**
- **Guiding candidate information to the right people through talent sourcing, recruiting and selection**

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*“You can create automated workflows that keep your business running, even when everything else has been interrupted. For example, an automated collections workflow that sends an email to customers with overdue invoices. That workflow can protect your cash flow when you need it most.”*

– CAL Business Solutions

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# 4

## Capitalize on data to drive business direction

Never has centralizing data been as important as it is today. Every modern organization is collecting data from transactions and functions across operations. But data siloed in separate systems for sales, production and financials can't support the fast, informed decisions needed today.

Microsoft Partners are helping organizations combine the power of Microsoft Dynamics and PowerBI to unlock data and put complete, decision-driving information into the hands of people who need it.

### Fluid forecasting

The speed of this crisis has turned every organization's forecasts upside down. With so many unknowns and variables still in play, forecasting has to be flexible and easy. Microsoft Dynamics Partners are helping businesses create forecasts built on multiple scenarios to help leaders understand how to respond to different levels of recovery and navigate through the challenges.

### Deep insights

Power BI combined with Dynamics ERP and CRM allows organizations to look for relationships and trends hidden in traditional reports. Just a few of the deep insights that Partners can help businesses unlock, include:

- **Identification of margin and sales trends across product groups to focus sales efforts**
- **Analysis of business unit margins to identify potential cost savings**
- **Tracking of marketing outcomes to focus resources**

### Promising discoveries

Microsoft Dynamics Partners are also helping organizations use data to evaluate the potential of business model pivots, with the ability to:

- **Identify products that have performed well through online sales to focus promotions and discounts**
- **Analyze costs to re-tool production facilities to produce new product lines**
- **Target customers with potential interest in services delivered remotely—training, advisory services, patient care**

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*"Business intelligence is critical if a business wants to remain agile and competitive. As a business grows or takes unexpected turns, it becomes more difficult to manage data. Microsoft has a proven track record in creating powerful tools for analytics. Analyzing your financial data with Power BI can transform your operations."*

– CAL Business Solutions

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## 5

## Empower customers with self-service options

Social distancing and stay at home orders have forced businesses to rethink their customers' journeys. Through customer self-service, organizations not only extend their reach, but they also enable employees to spend more time on special requests and exceptions.

### Innovative customer self-service

Working with organizations across industries, Microsoft Dynamics Partners apply lessons learned from self-service scenarios to create innovative solutions. More than just allowing customers to check on the status of an order or payment, multi-channel support (email, phone, chat and more) can be used to deliver exceptional customer experiences, such as:

- **Customer Self-Service Portals that can support a wide range of activities—manage subscriptions, log service calls, schedule appointments, process returns and more**
- **Virtual Agents that answer common questions or guide customers through a standard process**
- **Partner portals for resellers, distributors and suppliers to provide easy access to inventory, scheduling and product information**
- **Customer information hubs housing frequently asked questions, product documentation, community forums and more**



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*"Self-service options allow customers to answer their own questions, so they do not need to call into the company, which is likely already working with reduced staff during difficult times."*

– CAL Business Solutions

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# 6 Explore merger and acquisition opportunities

As the downturn squeezes margins and interrupts cash flow, not all businesses will survive on their own. For some there will be opportunities to combine forces, cutting costs through centralization and building on individual strengths. Leveraging the financial, integration and automation strengths of Microsoft Dynamics ERP and CRM, Partners can help organizations quickly explore and execute mergers and acquisitions.

## Identify opportunity

The combined power of Microsoft Dynamics and Power BI supports rich forecasting and scenario building to explore merger and acquisition opportunities. Organizations can combine data from multiple sources to predict future trends and identify potential economies of scale.

## Achieve results quickly

Microsoft Dynamics will help your combined organization move quickly to consolidate and unify operations. Achieve results quickly with:

- **Connected data across business units that supports uniform processes to improve productivity and deliver consistent customer experiences**
- **Automated administrative processes to improve efficiency so each worker can accomplish more and contribute to the bottom line**
- **Workflows that automatically drive business processes to bridge departments, improve productivity and reduce errors**

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*"With Microsoft Dynamics GP you can have a comprehensive view of all your business information to capitalize on opportunities and respond to changing market demands."*

– CAL Business Solutions

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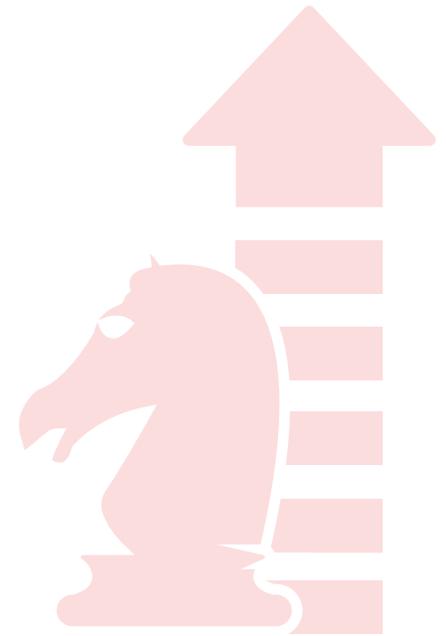
# 7 Reinvent business models to respond to change

While digital transformation has already driven big changes in consumer behavior and business operations, the COVID-19 crisis forces a whole new level of change for many organizations. As in-person activities are restricted, the digital world can fill the void to connect, educate and sell.

## Innovate to survive

Microsoft Dynamics Partners are helping organizations across all industries find their “new normal.” Using Microsoft Dynamics ERP and CRM as the platform, Partners can connect and extend operations in any direction. Just a few examples:

- **Membership-based organizations dependent on revenue streams from in-person events are turning to online learning and web-based education as profit centers.**
- **Retail businesses are expanding eCommerce channels and offering scheduled “curbside” pickup to customers.**
- **Service companies are providing guaranteed scheduling as well as clear social-distancing performance standards to reassure nervous customers.**
- **Manufacturers and wholesalers are developing remote sales and service delivery methods to replace in-person visits.**



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*“Microsoft Dynamics has a network of hundreds of add-on tools. So if you have to change your business model quickly, perhaps to add online ordering systems and eCommerce, you have plenty of options.”*

– CAL Business Solutions

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## 8

## Deliver insight to workers in the field

For businesses that provides services, the world has changed forever. Customers—both consumer and business—are discovering how greatly technology has transformed the potential of remote service delivery. AI (Artificial Intelligence), IoT (Internet of Things) and HoloLens virtual reality bring the benefits of the digital world to the field.

### The power of transformational technology

Microsoft Dynamics Partners are introducing businesses to the Microsoft field service tools to deliver convenient customer experiences, such as:

- **Enabling distributed technicians to collaborate and work together with a real-time view of a problem**
- **Implementing AI-supported augmented guided procedures that improve first-time fix rates**
- **Using mobile devices to create holograms that respond to the user's gaze, gestures and voice commands.**
- **Leveraging IoT sensors and predictive service models based on AI to detect and resolve issues in machinery before they become a problem.**
- **Performing remote inspections with video, screenshots and annotations without being on site.**

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*"You need to have a real-time view of your customer's activities across all your operations. When field service operations are fully integrated with the back office you can streamline dispatching, reduce response times, and minimize costs."*

– CAL Business Solutions

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## 9

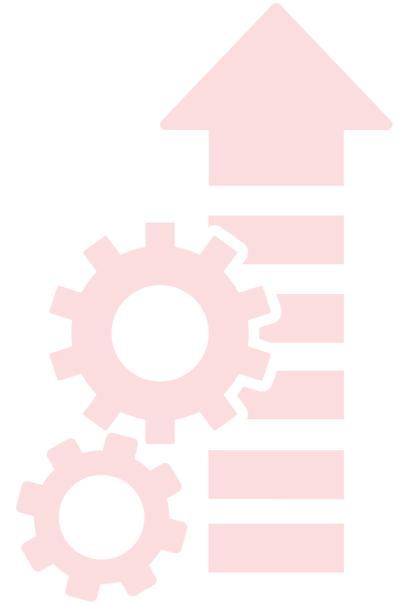
# Respond quickly to unexpected demand

For some organizations, like those in healthcare supplies and technology services the challenge has been to respond to a surge in demand with no time to prepare. With higher transaction volumes overwhelming business management systems and processes, Microsoft Dynamics Partners have stepped in to help organizations handle the rapid change.

## Scale quickly to meet demand

By connecting all the systems that an organization uses to sell, build and deliver products and services, Microsoft Dynamics Partners replace slow, manual work with automated workflows. With Microsoft Dynamics ERP and CRM systems connected to industry and specialized systems, businesses can scale with:

- **Data—orders, bills of material, production schedules, customer delivery instructions and more—flowing across departments to support higher volumes**
- **Unified and flexible financial reporting that supports multiple legal entities and currencies in a single instance**
- **Integration between ERP and eCommerce sites to streamline order processing**
- **Connected personnel accessing the knowledge they need from anywhere, working together across geographies and time zones**



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*“During this time, many distribution companies have seen their orders skyrocket rather than plummet. Having strong inventory control systems in place means they can adjust to the unexpected and better manage the inventory that is in demand.”*

– CAL Business Solutions

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# Experience when you need it, from a Partner you can trust

When times are difficult, the experience that a Microsoft Dynamics Partner has gained through years of problem-solving comes through.

For more than 35 years, CAL Business Solutions has been helping companies use technology to transform their business processes. Our team has implemented ERP systems at more than 500 companies. While we can't ever say that we have seen it all, we feel like we are close.

We have helped companies through times of growth and downturns, both in their individual businesses, industries and in the economy as a whole.

If this current crisis has shined a light on areas where technology can improve your business, CAL Business Solutions can help you find creative ways to thrive.

## Next Steps

We invite you to schedule an ERP software discovery call. During this discussion, George Mackiewicz, the owner of CAL Business Solutions, will ask questions about your business processes, current systems, pain points and goals. Based on 38 years of experience working with financial software, George will help you determine if Microsoft Dynamics GP or Acumatica is a good fit for your specific situation and give you a ballpark budget and timeline.

[Schedule an ERP software discovery call now](#)

There is no commitment and the points reviewed during this call can help you compare all your options as a more educated consumer.

Don't wait until the next crisis. Make your move toward more efficient business management systems now.

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*"The key to our sales process at CAL is listening. We listen to customers and try to really understand their needs in detail before we think of selling anything. We have built our business on honesty and fairness. We believe in the products we sell, and we enjoy helping companies solve their business problems."*

- George Mackiewicz, President,  
CAL Business Solutions

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# About CAL Business Solutions

Founded in 1982, CAL Business Solutions is a Connecticut based company focused on Microsoft Dynamics GP and Acumatica ERP systems.

- **Microsoft Dynamics GP Highlights:** [www.calszone.com/gp](http://www.calszone.com/gp)
- **Acumatica Cloud ERP Highlights:** [www.calszone.com/acumatica](http://www.calszone.com/acumatica)

One client described us as the “nuts and bolts guys.” We don’t wear fancy suits or close deals on the golf course. We are just a practical, hardworking team that has built our reputation by implementing the right software system to solve our customers’ issues at the right price. We don’t try to sell you extra bells and whistles that you don’t need, just because they look nice. We don’t speak in “techno-jargon” or bore you with fancy PowerPoint slides. We will give you honest advice, clear goals, straightforward answers, and a software system that works.

- **Get to know our team, our offices and our business values in the short video “[Meet the CAL Team.](#)”**
- **[Read success stories](#) outlining the business challenges, solution and benefits experienced by CAL Business Solutions clients.**

If you are considering new ERP software, upgrading your existing system, or if you currently use Microsoft Dynamics GP or Acumatica and want the best local support and training, let’s start the conversation.

## Contact CAL Business Solutions:

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