



## BUSINESS/IT CHALLENGE

FOLLOWING A MANAGEMENT BUYOUT IN JULY 2005, THE STRATEGY SET BY THE NEW BOARD OF DIRECTORS REQUIRED THAT THE MANY DIFFERENT AGING BUSINESS SYSTEMS AND NINE DIFFERENT DATABASES BE REPLACED WITH ONE SYSTEM AND ONE DATABASE THAT WOULD PROVIDE ALL THE FUNCTIONALITY NEEDED BY THE BUSINESS.

## SOLUTION

- MICROSOFT DYNAMICS NAV
- MICROSOFT SQL SERVER 2000 AND SQL REPORTING SERVICES
- TECTURA WORKFLOW
- TECTURA PROJECT

## KEY FUNCTIONALITY

- FINANCE
- PROCUREMENT
- SALES
- PRE-SALES
- LEAD, OPPORTUNITY AND CAMPAIGN MANAGEMENT
- PROJECT MANAGEMENT

## APEX REALISES BUSINESS BENEFITS BY MOVING FROM DISPARATE SYSTEMS AND NINE DATABASES TO ONE MICROSOFT DYNAMICS NAV SOLUTION

Apex is a provider of infrastructure systems and services based around three vendors, IBM, Cisco and Microsoft. Established in March 1989, Apex is a dynamic company that has grown steadily over the years. Currently they employ seventy staff and service their customers from offices in Cirencester. They are an IBM Premier Business Partner, a Cisco Premier Business Partner and Microsoft Gold Certified Partner.

In July 2005 the business was subject to a management buyout which resulted in a renewed strategy and plans for dramatic growth. The new Board of Directors planned to develop Apex from being simply a provider of infrastructure solutions to providing a more strategic service that would see their consultancy and services revenue grow. This strategy was deemed crucial for differentiating Apex from their competitors and increasing profit.

At the time of the management buyout Apex were using many different and ageing systems to manage their business. Like many businesses that have grown quickly Apex found itself in a position whereby a different system was being used for each major function and none of these systems were linked. The incumbent systems, including Pegasus and Zenith and nine different databases, had been in place for six to seven years and although they all did their jobs individually, there was no end-to-end view of the business and staff had to key the same data into different databases.

In addition Apex identified the following specific problems with their systems that would, if they continued using them, preclude Apex from achieving their growth plans:

- Restricted visibility of the sales pipeline
- Time consuming forecasting routines
- Inefficient management of trade debtors
- Inefficient data collation for management reporting
- Inefficient collaboration processes between departments.

Apex knew that the only way forward was to replace all their existing systems with one Enterprise Resource Planning (ERP) application and one database.

## CHALLENGE

The challenge was to find a system that could be used by all areas of Apex's business including finance, opportunity & lead management, sales, pre-sales, project implementation and procurement.

After talking to various companies within their industry about what systems they were using Apex drew up a shortlist of two, they were Microsoft Dynamics NAV and SAP Business One. An internal project team that included representatives from all areas of Apex's business was established to analyse each product and to make a decision on which one was the most suitable.

*"The Board knew instinctively that we needed to update our systems however I am delighted that we are enjoying real benefits so quickly after the system went live. We now have all the management information we need available at the touch of a button; we are saving 2 to 3 days on the financial reporting at month end and the benefit of having one system used by the whole business from a staff training and support point of view speaks for itself."*

Duncan Bulley  
Managing Director  
Apex

Following a thorough investigation Apex chose Microsoft Dynamics® NAV because it had all the functionality they needed to run their business and because of Microsoft's commitment to investing in the product for the future. In addition Apex felt they could build a good working relationship with the Microsoft Dynamics NAV solution provider, Tectura.

Apex's Managing Director Duncan Bulley takes up the story, "We met several people from Tectura during the selection process and at all stages we found them professional and knowledgeable. More than that we were confident that we could build a good working relationship with Tectura whose consultants and developers understood our business requirements and wanted to work with us to provide a system that delivered real benefits to our business."

## SOLUTION

Using their Tectura Solution Framework (TSF) methodology Tectura was able to plan and manage the implementation. Tectura and Apex staff formed a joint project team that worked closely together.

The first phase of the project was gathering requirements from the users. Tectura recommended that Apex should use the standard functionality of Microsoft Dynamics NAV with as little bespoke development as possible. When the requirements were understood, Tectura's consultants were able to configure

Microsoft Dynamics NAV and to specify and develop the small amount of be-spoke code that was required.

In addition to Microsoft Dynamics NAV, Tectura also implemented two of their own products—Tectura Workflow and Tectura Project. These products are particularly suitable for the IT services industry because Tectura Project allocates resources to a particular project enabling Apex to understand which projects are the most profitable and Tectura Workflow ensures that processes that span various departments are coordinated and completed on time.

The configured system was tested and when Apex was happy that the system worked as expected, the data from the various existing systems was migrated. The system went live in July 2006 and all seventy Apex staff now use it on a daily basis.

Duncan Bulley believes that a key part of the success of the project was that everyone within Apex's business understood the need for the new system and worked together to ensure the transition was as smooth as possible.

Duncan comments "The actual implementation was very smooth, Tectura were very thorough at gathering our requirements and also in advising us on how to get the best out of Microsoft Dynamics NAV."

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## BENEFITS

Since the system went live Apex has reported excellent trading results. Apex's first half-year of trading for 2006/07 has seen positives from all areas of their business, with year on year profit growth running at 16%.

Gross margin for the first half of the year was 5% higher than target and operating profit was 21% higher than budget. The revenue coming from services sat at 30%, in line with their overall objectives.

“It is great to see that we are exceeding our growth targets since the system went live. Of course these results are because of the hard work of all Apex staff however I firmly believe we could not deliver such a strong performance without replacing our disparate systems with Microsoft Dynamics NAV.

The Board knew instinctively that we needed to update our systems, however I am delighted that we are enjoying real benefits so quickly. We now have all the management information we need available at the touch of a button, we are saving 2 to 3 days on the financial reporting at month end and the benefit of having one system used by the whole business from a staff training and support point of view speaks for itself,” says Duncan.

Apex conducted a return on investment (ROI) study, before implementing Microsoft

Dynamics NAV that calculated that the system would pay for itself within two years of implementation.

With the benefits Apex are already experiencing they believe that the system will indeed pay for itself in cost savings and increased opportunity within 24 months of going live.

“I am delighted that Apex have realised the benefits they were expecting from the implementation of one solution for managing their entire business. At Tectura we are finding that the IT services industry is becoming more aware of the benefits of moving away from many disparate systems to one integrated ERP system. This is particularly true when Microsoft Dynamics NAV is implemented with Tectura Workflow and Tectura Project as is the case with Apex,” concludes Graham Frazer, Managing Director, Tectura UK.

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