

## SUCCESS STORIES

# Microsoft Dynamics 365 Business Central Futureproofs RISE Wisconsin



“We already had a relationship with Crestwood, so when we needed to upgrade, we saved time on the RFP process.”

- Michi Regier  
Accounting Manager



Microsoft Dynamics 365  
Business Central



### COMPANY

RISE Wisconsin, Inc.

### LOCATION

Madison, WI

### APPLICATION REPLACED

Microsoft Dynamics GP Great Plains

### SOLUTIONS

Microsoft Dynamics 365 Business Central

## The Challenge

RISE, a prominent nonprofit organization focuses on community-based, strengths-driven services to children, families, and young adults. This includes vital mental health wraparound services to children and their families and programs that build stable families and help prevent child abuse. A conglomeration of partnering agencies with collectively more than 40 years of experience providing services in in the Dane County, Wisconsin community, RISE serves over 1,000 participants annually.

For many years, the agency utilized Dynamics GP (Great Plains) for accounting and management of a complex menu of services and grant management. The rigidity of the software made data entry a frustrating and time consuming set of steps, which allowed for no error or course correction. Billing was tedious, relying upon massive spreadsheets. The time-consuming manual entry of grantor-required reporting left staff “Twiddling their thumbs a lot,” says Michi Regier, accounting manager. Data was housed on-site within a server, requiring unreliable and ineffective VPN access for off-site staff.

The agency needed a far more efficient and centralized ERP system to manage their critical work. The sun setting of Great Plains ERP was the perfect impetus to work with an experienced ERP implementation team like Crestwood to make the change to a superior platform.

## The Solution

RISE Wisconsin needed to adopt a cloud-based solution. Regier says, “We have 17 programs and with restricted grant funding, so we needed an easier way to manage it all.” Working with the experts at Crestwood, Microsoft Dynamics 365 Business Central was identified as the best fit for the agency’s needs.

Business Central ERP provided ease of data entry and compilation of reporting in a far more efficient process. The Crestwood team worked closely with RISE Wisconsin to understand the particular requirements of the nonprofit sector, as it is uniquely different from corporate, for-profit companies. RISE Wisconsin and Crestwood continue to work on creating the best solutions within the system like improved 1099 report generation, something made possible by the agility of Business Central.

### Key Results

- Significant costs savings on personnel and hardware
- Improved access for auditors to pull data
- Ease of executive approvals for billing
- Simplified accounting and reporting
- Improved internal controls

## The Outcome

While funding for RISE Wisconsin is becoming more complex, Business Central ensures managing that funding is becoming easier. Among the immediate outcomes is a savings of staff overhead. Less time and more efficiency has stanchued the need to hire more people on the accounting team.

Not having to invest in more onsite hardware is a great savings. And no longer relying upon VPN has eliminated the frustrations that come with logging in and out and losing connectivity on a daily basis.

A key time savings is notable with credit card transactions, of which there are typically 100 to 200 per month, now take two hours to process as opposed to four. As to billing and access to data from an auditing standpoint, the system is far faster and accurate.

Microsoft Dynamics 365 Business Central is the solution that will enable RISE Wisconsin to “future-proof” for an increased demand for their service to the community. The key so far with the new ERP system that the team sees is continuous improvement of their workflow and processes.



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