

Velosio[®]



CLIENT SOLUTION CASE STUDY

Sage Sustainable Electronics Gains Efficiencies with Microsoft Dynamics 365 Business Central



Overview



Software Solutions:

- Microsoft Dynamics 365 Business Central
- Microsoft Power BI
- Microsoft Power Apps
- Insight Works Inventory Management

Challenges:

- Outgrew QuickBooks solution
- Disconnected Systems
- Insight Constraints

Benefits:

- Automated Processes
- Improved Efficiencies
- Real-time data visibility in end-to-end solution

Company Overview:

As a leader in IT Asset Disposition (ITAD) Sage Sustainable Electronics is committed to driving innovation in asset management.

Industry: IT Asset Management and Lifecycle Services

Headquarters: Columbus, OH

Processing Facilities: Reno NV, Madison WI, Indianapolis IN, Columbus OH, Montgomeryville PA, Orlando FL

Background

Sage makes the world — and its customers — more sustainable by extending the life of technology. Founded in 2014, Sage is trusted by Fortune 100 companies in healthcare, banking, SaaS, defense, and fintech industries to securely manage their IT lifecycle management and IT asset distribution (ITAD) programs.

Partnering with Sage to reuse more and recycle less, IT departments realize higher yields of refurbished devices, increasing financial returns for shareholders while meeting corporate objectives to decrease carbon emissions for the planet.

Improved sustainability matters from the boardroom to the front lines. According to the Wall Street Journal, 25% of 2022's Fortune 500 board appointees had previous experience on sustainability committees — an 11% increase since 2021.

This means more demand for sustainability results from a company's lifecycle management and ITAD practices. As an e-Steward certified ITAD provider, the mission at Sage is sustainability. No matter how large the challenge is, Sage is ready to help.

Growing by leaps and bounds, Sage was struggling with its use of QuickBooks for financial management in combination with an aging legacy supporting systems. The pandemic affected Sage's

initial business support framework, leading them to re-evaluate and engage with Velosio. Velosio's ability to handle multiple projects and provide diverse solutions solidified the partnership.

"We reached a point where QuickBooks could no longer grow with us," says Sage CIO Patrick Kara. "Also, we wanted to do more than just finance. We wanted a system that could manage our warehouse functions, our sales processes, and more. QuickBooks was not the right tool for this," continues Kara.

Sage initially engaged with Velosio for a financial project to move from QuickBooks to Microsoft Dynamics 365 Business Central (Business Central). As one of the few Microsoft Authorized Refurbishers in the country, Sage has a close relationship with Microsoft and considers itself a "Microsoft shop," making a Microsoft solution attractive to them. They later added CRM (Microsoft Dynamics 365 Customer Engagement), and warehouse and inventory management, which introduced Sage to Power BI, Power Apps, Insight Works for Inventory Management, and APIs for integration, further expanding the relationship with Velosio.



Implementation and Training

Sage elected to implement Business Central with Velosio’s quick start, express implementation. Velosio Express is a unique deployment option for Business Central that delivers an accelerated implementation built on proven best practices and a pre-defined scope of services. Velosio Express is designed to help companies take advantage of the Microsoft cloud platform at an implementation timeline and price point that quickly delivers real value. Velosio Express clients can go live with a new deployment in as few as 90 days, including configuration, data migration, user acceptance testing, training, and security.

Sage opted for a phased implementation approach, moving financial data from QuickBooks first, then migrating warehouse management and sales activities, followed by workflow and contract management. “We decided on a phased implementation to keep the business running, and to avoid delaying

the value proposition,” says Kara. “By implementing one piece at a time, we limited the amount of change, bringing value faster, and it also gave us the opportunity in parallel to define the next phase,” continues Kara. “With every project-phase we learned from the previous phase of the implementation, whether it was about the business, about the tool, or about the processes. So now we have a bouquet of solutions, with different phases and maturities. These are the best fit for those scopes and functions but work well together to produce the value proposition and run the transactions from beginning to end. This allows us, in two years, what takes other organizations three to five years to accomplish.”

Training was an area where Sage was surprised to learn that they needed to invest more time and resources, as users were very used to the old way of accomplishing tasks. “Training has been the longest part of the process, and an ongoing journey - especially with turnover, and new people coming in,” says Kara. “We still have a mix of skeptics and champions, and we are trying to encourage more champions of the new way of doing things and the new culture and processes.” Sage invested time in a soft launch and hard launch of the system, and had a team from Velosio sit with the users and run all-day training sessions. “We did receive positive feedback on that because the users got something out of it,” explains Kara. “They were able for that week to feel some comfort in knowing the experts were literally sitting down in the office with them to answer questions as they arose,” continues Kara. The soft launch was one week, and the hard launch was a separate week, separated by a month or so. “Separating the soft and hard launch weeks allowed people to think about the first session and determine what questions they needed to ask in the second session,” says Kara.





System Benefits

Sage has been able to continue its fast-paced growth with the help of Microsoft Dynamics 365 Business Central. The organization recently acquired another warehouse in Pennsylvania, adding both space and employees. “Dynamics is helping us leverage the cloud in a way where we’re not limited by location or infrastructure,” says Kara. “We just add licenses, scanners, and users. We configure everything in the warehouse and off we go,” adds Kara.

Sage also reports that the operational team is more efficient, and they have added confidence in a cloud-based, trackable, traceable, auditable system. “I have zero doubt that we are more efficient,” says Kara. “I know when I talk to the operations team on the floor, they report higher efficiencies,” continues Kara.

Sage has strengthened its business intelligence with help from Power BI. “We started out by learning about what Power BI can do - moving away from Excel, but we didn’t fully leverage what it is capable of,” continues Kara. “With Velosio’s advanced help and data team we have moved towards dashboarding and true business intelligence. We now leverage Microsoft Fabric and additional features that we wouldn’t have been able to do without Velosio,” continues Kara.

Future Plans

Sage is expanding its use of Microsoft Dynamics 365 Customer Engagement to include contract and workflow management, and is interested in integrating AI into Sage’s operations, particularly for workforce management and plant operations. Sage and Velosio are also working on developing additional Power Platform Apps & Automation.

Sage is happy with its relationship with Velosio and their ability to support the organization’s fast paced growth. Patrick Kara refers to his Velosio Client Account Manager (CAM) as his Swiss Army knife because she’s able to gather the right resources for he and his team. “It’s always good to know we have a first line of defense who can find the answers for us quickly with the resources she has at her fingertips,” says Kara.



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