

Transparent Overview of Customers and Projects

synalis
modernes Informationsmanagement

The employees of the company synalis had to spend a lot of time with administrative tasks since the project management area did not integrate well with business applications. The company therefore decided to migrate to a resource management system which tightly integrates with Microsoft Dynamics CRM. Since then synalis no longer has to run any transfer and alignment processes. Thanks to streamlined processes, the employees are now freed from time-consuming tasks. By providing quick access to transparent data the management is offered a 360-degree-view on the projects.

The consulting and software company synalis is specialized on innovative IT information management systems. The company's products and services are mainly focused on the conception and implementation of intelligent IT solutions. These solutions help companies to manage and process data efficiently and to use them for targeted controlling. The company's 25 employees mainly serve medium-sized companies. "Our business activities are nationwide offering vertical solutions for consulting companies, security providers, metal-processing, auditing and tax consulting companies," Norbert Schmidt, Head of Marketing & Sales at synalis, explains. The IT service provider, situated in Bonn, is one of the founding members of the CRM Vision Group, a European network of Microsoft partners specialized on Microsoft Dynamics CRM. The joint project does not only open up new sales opportunities for synalis, but also positively impacts its own IT landscape.



The project management system proRM enables the IT project service company synalis to work more efficiently, more secure and with a comprehensive project overview.

Integration as a Decisive Factor

For IT service providers like synalis it is of particular importance to perform projects which meet the individual needs of each customer, including the requirement to be continuously informed on the current status of the projects with a transparent view on the costs and budget. In this context, the required project accounting tasks to be performed by the employees should be kept at a minimum. Norbert Schmidt: "This can only be realized with efficient, largely automated processes and with an interface which is easy to use." The company's former project management system, however, did no longer meet the business needs. It particularly did not offer the required integration to the ERP and CRM system. "In order to get a comprehensive overview of a project, we had to consolidate the data from different systems manually. In the Invoicing area, one employee was required to exclusively process and invoice the project data," Norbert Schmidt remembers.

synalis evaluated a number of solutions and finally found the ideal system in 2009 considering the overall picture: synalis has been using Microsoft Dynamics CRM for its sales, marketing, and sales areas for many years. And the company already planned to migrate to the ERP system Microsoft Dynamics NAV so that the best suitable solution for the project management area was easily found: synalis decided to implement the resource management system "proRM" which is based on Microsoft Dynamics CRM. proRM is a software developed by the German software company proMX, one of partners of the European CRM Vision Group. "We already implemented the consistent integration of Microsoft Dynamics CRM and Microsoft Dynamics NAV. With proRM we had the chance to merge the three core applications into one integrated platform. Therefore, it did not take us long to make our decision," explains Norbert Schmidt. Another important aspect are the comprehensive functionalities of proRM which integrates the operational processes – ranging from the selection of employees to final invoicing – into one single process.

Streamlined Processes

The successful integration and the comprehensive functionalities of proRM enabled us to quickly introduce the system while keeping the costs at a low level. "We only added a few

fields and option lists. The major part was covered up to 90 percent by proRM," Norbert Schmidt confirms. The introduction of proRM and the migration to the business software Microsoft Dynamics NAV were performed simultaneously. Today proRM and Microsoft Dynamics NAV are connected together via the integration solution called "syncster". syncster is an in-house development of synalis enabling to transfer invoicing data from the proRM system to the business application.

Process optimization turned out to be more complicated than the technical implementation. "We used this situation to critically check and improve the status quo," explains Norbert Schmidt. So as a consequence invoicing is now done by the responsible project leaders and not managed centrally by one person. The project leaders always have the "current data" available at their fingertips so that completed project areas can be invoiced much faster. Also activity recording is simplified in a noticeable manner since the project members now can enter their working times either by using the web browser or based on the Windows client which can also be used offline.

Professional Project Controlling

Since autumn 2009, synalis now manages its projects and resources by using proRM enabling the company to benefit from streamlined processes and a consistent database. "We no longer need to spend time performing complex alignments. We are now more flexible and faster in all project management areas. Core processes such as invoicing are safer than before," says Norbert Schmidt happily. A major benefit for the management is the significantly enhanced project controlling area: Today only a few clicks are required e.g. to check the workload of individual employees, to control the current status of ongoing projects or to compare costs with budgets. Also a number of alert functions could be set up. "If budget milestones agreed upon for fix price projects are achieved, the proRM system delivers the required information in order to take the right measures," explains Norbert Schmidt. From his point of view, the migration to the new software will pay off within a few months. "We were able to free our project employees from tiresome routine tasks and to improve the data quality at the same time," he adds. Schmidt is confident that the additional efficiency will soon become visible in the company's business results."

Country	Germany
Industry	IT Services
Employees	25
Implementation Phase	3 months

Customer Profile

synalis is specialized on the creation and extension of IT based information systems. The company's core business areas are "business information systems", "information and knowledge management" and "IT infrastructures and network systems ". Its 25 employees mainly serve medium-sized companies of the region. The implementation of specific vertical solutions and CRM projects is done nationwide.

About proRM

proRM is a vertical solution for project-oriented service companies and departments based on Microsoft Dynamics CRM. proRM enhances the Microsoft Dynamics CRM software with additional functionalities for the Skill Management, Project Management, Contract Management, Resource Planning, Activity Management and Invoicing areas. It offers, among others, connections to Microsoft Project, Microsoft Office, Microsoft Office SharePoint Server, Microsoft Dynamics NAV and Microsoft Dynamics AX.

About proMX

The German software company proMX, situated in Nuremberg, founded in 2000, is specialized on the conception and implementation of CRM, business intelligence and

infrastructure solutions. The company's top priority for the implementation of projects is based on the development of comprehensive and integrated solutions. proMX is one of the founding members of the CRM Vision Group, the European network of Microsoft partners specialized on Microsoft Dynamics CRM.

Quotations

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