



Microsoft Dynamics Customer Solution Case Study



WESLEY HOMES™

Overview

Country or Region: United States
Industry: Healthcare—Retirement communities and health services

Customer Profile

Wesley Homes provides high-quality care, including residential homes and apartments, assisted living, home healthcare, and skilled nursing, to the elder population in the U.S. Pacific Northwest.

Business Situation

Wesley Homes was not taking advantage of the full functionality of its Microsoft Dynamics® GP software, which sometimes resulted in time-consuming manual processes, inefficiency, and duplication of effort.

Solution

Wesley Homes called on Microsoft® Gold Certified Partner The Resource Group to help realize the full functionality of Microsoft Dynamics GP, increase efficiency, and streamline business processes.

Benefits

- Reduced time to reconcile related-party accounts from eight hours to two
- Streamlined purchasing processes
- Increased visibility into cash balance
- Better positioning for future growth

Retirement Organization Increases Efficiency, Realizes Potential of Software System

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John Feneis, Controller, Wesley Homes

Wesley Homes provides housing and services to senior citizens in the U.S. Pacific Northwest. A not-for-profit organization with big growth plans, Wesley Homes sought to ensure that it was making the most of its investment in technology. Working with Microsoft® Gold Certified Partner The Resource Group, Wesley Homes undertook a comprehensive review of its business and technologies and found that it was not using its Microsoft Dynamics® GP financial management system to its fullest potential. As a result, its accounting staff spent too much time handling paperwork, performing manual processes, and duplicating efforts. With help from The Resource Group, Wesley Homes upgraded Microsoft Dynamics GP to include new functionality to more efficiently process transactions, simplify budgeting and purchasing processes, improve banking operations, and better accommodate future growth.

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John Feneis, Contoller, Wesley Homes

Situation

Since 1944, Wesley Homes has provided high-quality care to members of the elder population in the Pacific Northwest region of the United States. A faith-based organization affiliated with the Pacific Northwest Conference of the United Methodist Church, Wesley Homes provides a comprehensive network of housing and services, including residential homes and apartments, assisted living, home healthcare, and skilled nursing care.

A not-for-profit organization based in Des Moines, Washington, Wesley Homes is committed to providing outstanding care to its more than 800 residents, as well as hundreds of clients and patients who benefit from the home health services it provides. In fact, a ratings agency for Medicare recently ranked the organization's quality of care in the top 25 of about 6,000 agencies surveyed nationwide.

By almost any measure, Wesley Homes is growing. It recently constructed a second residential campus and hopes to build three to five additional campuses in the next 10 years. It has expanded the network of services it provides to allow seniors to stay in place, rather than moving from location to location as they grow older. Wesley Homes started a private-pay home care agency, through which nurses and aides visit elders in their homes. More recently, Wesley Homes purchased a Medicare-certified home health agency, which allows elders to receive in-home healthcare under the direction of a physician.

In addition to the services Wesley Homes provides, it also operates the Wesley Homes Foundation, which raises funds to help meet the current and future needs of residents and to provide critical funding for operations.

Like other organizations in the retirement community industry, Wesley Homes faces its share of challenges. Competition for residents is keen, as is the need to find and retain good employees. And its reimbursements from federal and state governments are shrinking.

As a result, Wesley Homes needs to provide outstanding care while keeping a firm rein on costs and getting maximum productivity from existing resources. For example, it recently increased the use of internal resources to remodel facilities, thereby cutting costs by reducing the number of outside contractors for remodeling and maintenance.

Solution

The organization's commitment to do more with less applies to its accounting department as well. Wesley Homes implemented Microsoft Dynamics® GP as its financial management system in 1999. Upon taking over as Contoller in June 2008, John Feneis evaluated the accounting department and noticed that the four accounting and two payroll employees were sometimes performing manual processes and duplicating efforts, especially when managing the budgeting process, handling purchasing duties, processing transactions between multiple companies, and managing fixed assets.

Feneis suspected that the department could make better use of Microsoft Dynamics GP to streamline processes and give the accounting staff more time to take on additional responsibilities related to the growth Wesley Homes expects to achieve. For example, with the recent addition of its second residential living campus, Wesley Homes doubled the size of its balance sheet—which increased the duties performed by the agency's accounting staff. With plans to build three to five additional residential living campuses in the

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John Feneis, Controller, Wesley Homes

next decade, Wesley Homes needed technologies that would allow its accounting department to handle the additional workload without adding staff.

Feneis asked the company’s Seattle-based Microsoft® Gold Certified Partner, The Resource Group, to conduct an assessment of the accounting department’s operations and software. “We needed to know what we as a department were doing, how we were doing it, and what we needed to be doing to be able to accommodate our future growth,” Feneis says.

The assessment found that the organization could better use Microsoft Dynamics GP to meet its growing needs. Although Wesley Homes relied on Microsoft Dynamics GP as its General Ledger, it wasn’t using much of the other functionality that the software offered. “Even though we had Microsoft Dynamics GP, we were still using it as a manual system,” Feneis says. “There was too much manual processing, inefficiency, and duplication of effort. In order to grow, we needed to develop some efficiencies.”

With help from The Resource Group, Wesley Homes set out to realize the full benefits Microsoft Dynamics GP. “When Wesley Homes came to us with the goal of using their existing platform to increase operational efficiency, we got to do what we like best: Solve real business problems with technology,” says Neil Smith, Professional Services Manager at The Resource Group. “The rich functionality available within their current Microsoft Dynamics GP system, combined with our experience working with senior-care organizations, allowed us to mold a solution to meet their needs—all within an achievable timeline and budget.”

To help increase efficiency and reduce manual processes, The Resource Group deployed Purchase Order Processing,

Inventory Management, and Bank Reconciliation for Microsoft Dynamics GP, as well as Microsoft Forecaster and InterCompany Postings, from Microsoft Gold Certified Partner Nolan Computers.

Benefits

Although Wesley Homes is currently still deploying the additional functionality for its Microsoft Dynamics GP system, the changes made so far have helped its accounting department reduce manual and duplicate processes and operate more quickly and efficiently. This, in turn, will allow the department to take on additional responsibilities as Wesley Homes continues to grow.

Increased Efficiency

The Resource Group implemented InterCompany Postings and helped Wesley Homes revamp its Chart of Accounts to better align with its multiple companies and departments. Wesley Homes benefits from an automated system for processing intercompany transactions, as well as cross-company drill-down inquiry and assistance in reconciling intercompany accounts. This allows its accounting staff to process intercompany transactions faster and with fewer errors. In fact, Feneis estimates that InterCompany Postings has helped reduce the time it takes to reconcile related-party accounts during month-end close from eight hours to just two. The system has also led to improved reporting while providing the flexibility to easily add additional locations in the future.

Streamlined Purchasing and Banking

In addition to implementing Purchase Order Processing and Inventory Management, Wesley Homes established a centralized purchasing department. As a result, the organization has been able to centralize and automate its purchasing processes, allowing

it to save time, reduce errors, and gain additional control over purchasing activities. And unlike the past, when accounting staff had limited visibility into cash balances, the staff can now look into Microsoft Dynamics GP for an accurate picture of finances at any given moment.

Faster, Easier Budgeting Process

In the past, the organization's budgeting process was manual and time consuming. To streamline the process, The Resource Group is implementing Microsoft Forecaster, a budgeting and planning application that works in conjunction with Microsoft Dynamics GP. Microsoft Forecaster will provide decision makers at Wesley Homes with rapid access to the critical, decision-driving data they need for faster, more streamlined budgeting.

Flexible, Scalable Software to Meet Future Needs

For a growing organization like Wesley Homes, having a software system that can accommodate future growth is critical, Feneis says. "I like the fact that I can use as little or as much of Microsoft Dynamics GP as I want. Plus, I don't have to implement all the functionality at one time. That way, it's not overwhelming for my staff."

Feneis also appreciates the many third-party applications, such as InterCompany Postings, that can add specific functionality to his Microsoft Dynamics GP system. "I like the fact that Microsoft has shared source code with these other software vendors so that they can develop applications that complement the system I have," he says. "To me, that's key. I don't want to have to hire someone to develop custom software."

The Right Software from a Trusted Partner

Wesley Homes has been impressed with The Resource Group's dedication to meeting its business needs. "They have bent over backwards helping us with what is truly a massive organizational transition project," Feneis explains. "I've worked with four different consultants from The Resource Group. They all know exactly what's happening with our project and what they need to be doing for us. They've really been a great group to work with!"

For More Information

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For more information about The Resource Group products and services, call 425-277-4760 or visit the Web site at: www.resgroup.com

For more information about Wesley Homes products and services, call 206-824-5000 or visit the Web site at: www.wesleyhomes.org

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

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