

CASE STUDY – SUNRISE SPAS



The organization

Sunrise Spas is a privately-owned Canadian company. Sunrise manufactures and distributes spas and hot tubs to dealers in Canada and the United States. In addition, Sunrise has a manufacturing facility in Florida, and a distribution company in Holland.

Sunrise had an existing customized ERP system, and an Act database. Neither of these systems was robust enough to keep up with the needs of an ever-growing business. In addition, Sunrise was looking for a solution that could accommodate the needs of its remote locations in Florida and Holland.

The challenge

Sunrise had service staff in Grimsby, Ontario providing warranty support to retail customers of their spa dealers throughout the world. The key problems were:

- No integration between the contact management system (Act) and their ERP system
- Requirement for knowledge base articles to assist in solving warranty cases on spas
- Duplication of data
- Requirement to have access to serial number information for various spa components when processing warranty claims

Why Microsoft Dynamics CRM?

BDO was selected to implement the new system based on its extensive experience in Project Management and operational change, along with strong skills with productivity and efficiency improvements. In addition, BDO was implementing a Dynamics NAV solution to replace the current ERP system. We suggested Microsoft Dynamics CRM to address Sunrise's requirements for the following reasons:

Integration with existing Microsoft products

- Sunrise used Microsoft Outlook extensively, and needed a CRM solution that would integrate tightly with Outlook, and particularly with its Blackberries through a Blackberry Enterprise Server
- Sunrise had various templates in Microsoft Word for warranty claims, RMA requests, service requests, etc. that they wanted to leverage with a CRM solution
- Microsoft Dynamics CRM provided knowledge-based articles to assist in solving warranty cases
- Integration with Dynamics NAV allowed for a single source of data for dealers, service providers and retail customers

Ease of use

- Microsoft Dynamics CRM was easily customized to deal with the case tracking requirements of Sunrise
- With a standard Microsoft interface, Dynamics CRM is an easy system to learn
- Power users at Sunrise were able to learn the system, and train new employees with only limited assistance from BDO

SECTOR

Manufacturing

ABOUT BDO

BDO International is a world wide network of public accounting firms, called BDO Member Firms. Each BDO Member Firm is an independent legal entity in its own country. The combined fee income of all the BDO Member Firms, including the members of their exclusive alliances, was \$5.03 billion in 2009. The global network has 1,138 offices in 110 countries and more than 46,000 people provide advisory services throughout the world. BDO is the brand name for the BDO International network and for each of the BDO Member Firms.

www.bdointernational.com

ABOUT BDO IN CANADA

BDO is the sixth largest accounting and advisory firm in Canada with 95 offices nationwide. Our professionals have the expertise to serve owner-managed, large and mid-market companies, communities and non-profits in a broad range of industries.

Vendor stability

- It is critical that Sunrise operate technology that is widely recognized and supported in its remote locations in Florida and Holland; this increases its ability to obtain remote support from skilled professionals
- Microsoft Dynamics CRM runs on the proven industry standard database, Microsoft SQL, and is currently in Release 4.0
- By using proven technology, Sunrise will be able to maximize the return on its investment and continue to build on its existing Microsoft technology

The results

- A new 'Spa' entity was created in CRM, with a new spa record automatically created and attached to a dealer once an invoice was created in Dynamics NAV
- All serial number and product details are tracked on the spa record in CRM
- Warranty and service cases are attached to spa records and, therefore, automatically attached to the dealer and retail customer

- All documents and photos related to a warranty claim are attached in CRM and available to all users
- A single CRM database was created to handle all customers and spa records for Grimsby, Florida and Holland; this database is synchronized with each of the three Dynamics NAV accounting systems
- Grimsby support staff are able to handle service claims very efficiently for all three companies
- Extensive use of workflows in Dynamics CRM allowed for existing processes to be implemented automatically and tracked in CRM



BDO Solutions helps small, medium and large size organizations align technology to their overall business strategies using Microsoft technology. We specialize in implementing Microsoft Dynamics GP and NAV and Microsoft Dynamics CRM enabling our clients to streamline their business processes and improve overall operational efficiency. For additional information please contact:

Gillian Martin
gmartin@bdo.ca
Direct: 416 369 4362
Cell: 416 315 4463

Michael Stranz
mstranz@bdo.ca
Direct: 519 772 0334
Cell: 519 748 7170

Jim Krahn
jkrahn@bdo.ca
Office: 403 231 5440
x 5625
Cell: 403 827 7355