

ANNATA 365 FOR FLEET CUSTOMER STORY OURO VERDE

Fleet Management Solution for
Microsoft Dynamics 365 for Operation



ANNATA 365
FOR DYNAMICS



CUSTOMER

Ouro Verde is one of top four Brazilian vehicle and heavy machinery fleet management and rental companies, with aggressive annual growth (15-30% on last 10 years). They were looking for a robust, complete, integrated end-to-end automotive solution to address a business plan for managing 100.000 vehicles on rental and fleet management services. The goal was to integrate ERP's Procurement and Finance processes in a single platform with Sales, Operations, and Billing processes and improve operational efficiency and data reliability by eliminating all legacy systems.

CUSTOMER PROFILE

Ouro Verde's history started as Transportadora e Cerealista Ouro Verde founded in the city of Ponta Grossa, Paraná, Brazil in 1973, serving major companies from different industries. Two years later, we began to offer vehicle rental services, which was boosted by the construction of the Itaipu Hydroelectric Power Plant. In 1985, our head office moved to Curitiba and business expanded nationwide. In the 1990s, Ouro Verde began to rent heavy machinery and, in 1994, industrial cargo which was increasing enabled us to create an international subsidiary in Buenos Aires, Argentina. In the early 2000s, Ouro Verde made large investments to upgrade and increase our light vehicle and heavy machinery fleets. After a great period of stability and growth, Ouro Verde adopted a new corporate governance model, modernizing management within the company. In 2011, Ouro Verde began to exclusively focus on vehicle and equipment rentals and provision of services.

SITUATION

Until 2011, Ouro Verde had been using a mix of custom made suite of systems developed internally and departmentalized market solutions. This resulted in poor data integrity, reworking and complex systems integration and IT management. Another problem was that some solutions were not robust enough to support company's annual aggressive growth. In 2013, Ouro Verde implemented Dynamics AX ERP for Procurement and Finance processes, but the main company processes for customer service, cost control and revenue source – fleet Sales, Operations and Billing processes - were still a problem due to the previous situation.

SOLUTION

Ouro Verde started to look for a business solution that would integrate seamlessly to their Microsoft ERP and thus started evaluating alternatives globally. After numerous benchmarks, case visits abroad and some proofs of concepts, Ouro Verde decided to use the industry leading technology and extensive functionality offered by Microsoft and Annata. They decided to define the strategy and have a centralized management for vendors and own teams, involving Annata and service vendors from Chile and Brazil.

The project strategy was defined on two major phases: Process Definitions (AS-IS and TO-BE) and Project Implementation. As Ouro Verde defined the project from business perspective and not from technical solution, they decided to avoid "turn-key" go-live strategies to avoid operational risks as it was a huge culture and process transformation. Thus the Project implementation phase was also broken in three separated go-lives:

1. Asset Management Transformation – although it was a horizontal approach covering many different processes and departments, it was focused on back office processes and avoided changes on customer facing solutions, limiting the scope and mitigating risks. This strategy enabled elimination of most Sales, Procurement and Billing legacy systems and enabled important revenue improvement actions.
2. Operations Transformation – after the company (users and IT teams) were used to the new solution on the previous phase, it was time to address the customer sensitive processes and most risky ones, since Ouro Verde provides service SLA's for customer's fleet maintenance and availability with more than 4.000 maintenance service providers nationwide. That means not only changing legacy fleet and maintenance solutions, but also call center, B2B and B2C Web Portals. Headquarters and more than 15 subsidiaries were involved on this phase.
3. ERP Upgrade for Finance Processes - After the company was fully running on the new solution, the last phase was to address Finance back office solution, upgrading the Dynamics AX ERP to the latest 2012 version and thus fully obtain the benefits of having an end-to-end solution on a single platform.

IMPLEMENTATION

To ensure that the requirements for configuration, customization, and integration were the most assertive possible, Ouro Verde used a hybrid approach mixing Microsoft SureStep methodology and Agile Practices. By having live sessions with the solution and incremental cycles, IT team and users were continuously learning and maturing the business requirements before huge investments that could change later the project.

To drive such a big transformation, Ouro Verde defined qualified key users, many of them were managers of the company. These key users had some key responsibilities, such as involving the best people available in the team and a willingness to change. The company's Board were the sponsors, with direct involvement of CEO on the program management.

For more than two years, vendors, IT team and key users worked as a single project team, being physically in the same place, to facilitate communication and decisions. In order to prepare for the critical go-lives, "war room" teams were built weeks before and after the go-lives, in order to quickly address the issues and reduce operational risks of the changes.

BENEFITS

There were a huge company's cultural change by this technology transformation. The standardization of business processes, better access and control of information prepared the company for growth and brought these important business benefits:

TOP LINE:

- Due to the sophisticated rules for managing contracts and measuring asset usage, one of the biggest paybacks is a consequent increase in revenue due to higher assertiveness on fleet billing.
- The solution enabled company's new product and source of revenue - fleet management services for third- party customer fleets.
- The new platform has made the company more competitive in the market, obtaining an incredibly contracts renewal rate in 2016, higher than the segment average.
- Pricing assertiveness for fleet management and rental proposals, based on real asset TCO (acquisition, maintenance and re-marketing) as it's now much effective to track and calculate due to the single platform across different departments.
- Shorter time-to-market for commercial proposals due to the sales funnel management and version and reuse of information.

BOTTOM LINE:

- Integrated management of procurement, customization, and delivery of assets to clients, ensured that the asset would be delivered within the time promised and exactly as stated in the signed proposal, avoiding delivery errors.
- Reduction of customer complaints and more assertive cash-flow due to billing disputes, whether by service billing or vehicle delivery.
- Integration between CRM and Contracts has made it possible to move the services on the Web (B2B Portal and Mobile App), improving customer satisfaction and reducing back office costs.
- Main back offices reduction due to processes standardization and tasks automation.
- Robust pavement for aggressive growth, enabling management of hundreds of thousands of vehicles on the next years without having to worry about technology platform.

Annata 365 for Dynamics is proud of being always certified for Microsoft Dynamics 365 on all new releases.

The certification program ensures that Annata 365 for Dynamics is tested to work seamlessly with Dynamics 365 for Operation. It also certifies that the overall user experience is consistent and in line with Microsoft user experience guidelines, that the solution is fully documented and is accessible directly from the users working processes.



Microsoft
Dynamics 365

Certified

Annata 365 for Dynamics

Annata 365 is a modern, cloud-based management solution for the automotive, equipment, rental and fleet industries that meets today's and future business and operational needs.

Annata 365 fully integrated with Microsoft Dynamics 365 and uses the standard features of Dynamics 365 for Operation, as well as extensive additional features specifically designed to support the automotive and equipment industries. It handles all key business processes during the entire vehicle's/equipment's life-cycle and allows to analyze it in a simple and readable way using Annata Power BI. It's extremely flexible architectural design are evidently proven in helping to meet our customer's rapid growth demands, enhancing the capabilities to meet market changes and competitions.

ABOUT ANNATA

Annata is an international management consulting and technology services company. With the combination of deep industry experience and comprehensive capabilities within chosen technology areas, Annata works closely with customers and partners around the world to help them become high performance businesses.

Annata's strategy builds on our expertise in consulting and technology. Adding that to our industry knowledge and the industry specific solutions offering, we help businesses around the world to undertake high-impact business improvement projects. Through industry focus and relentless determination to deliver world class technology solutions we have gained trusted status with many of the world's best known companies. Locally we have earned the trust of businesses of all sizes in many industries. Annata enjoys strategic partnerships with local, regional and global partners who have embraced our technology solutions and created new business opportunities, earning them a preferred status on their own.

CONTACT US

Learn more about making Annata your trusted advisor and business management systems partner. Contact us today.

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