

## Project Partnership

Evolutionary Business Solutions, Inc. (EBSI) cites “lack of a proven implementation methodology” as one of the top reasons setups fail. For Microsoft Dynamics GP and SL, Wizard X4 provides a reliable, proven solution and complements EBSI’s philosophy of providing total client support and management.

## About

**Wizard X4 Productivity Suite™** automates Microsoft Dynamics setup with a user-friendly, intuitive Q&A approach. Created by Wizard Productivity Systems, LP™ leading software implementation/automation innovator, X4 features four integrated components: iConsultant® provides the Q&A to configure the system; ConvertMSTR™ accelerates analysis, mapping and importing of data from any legacy system; Config-TRKR® provides an automatic documentation audit trail; Experienced X4 consultants advise about design and implementation issues.



EVOLUTIONARY BUSINESS SOLUTIONS, INC.

**Evolutionary Business Solutions, Inc. (EBSI)** Based in the Washington, D.C. metropolitan area, EBSI is a management consulting firm serving Mid-Atlantic and Midwest clients. The firm specializes in business performance improvement through comprehensive management of organizational change coupled with appropriate technology solutions. EBSI builds business solutions based on identifying the right business processes to effect meaningful change, developing total management buy-in, then implementing with the right team and technology.

EBSI's team dedicates itself to continuous improvement with ongoing training and maintenance of such industry certifications as Certified Public Accountant, Certified Management Accountant, Microsoft Certified Professional, Great Plains Certified Accounting Application Specialist and Great Plains Certified Installation Specialist. Team members are active in civic and professional organizations and charitable activities.

## CHALLENGE

### Develop Microsoft Dynamics GP setup guidance systems that practically fly themselves.

Client setups excel in a user-friendly, fail-safe environment that allows risk-free experimentation. Consultants thrive when able to concentrate on higher-value services and greater numbers of simultaneous installations.

## SOLUTION

### Wizard X4 provides a reliable, consistent flight checklist and serves as a fail-safe teaching tool.

“Wizard X4 helps clients go through the checklist in the right order and provides relevant examples, all in a safe trial-and-error environment,” notes Chris Conway, principal of Evolutionary Business Solutions, Inc. (EBSI). “And, Wizard’s development specialists are readily available to help both the client and consultant—you don’t have to go through five levels of client service to get there. With clients getting both guided instruction and ready support from the Wizard suite, consultants can concentrate on their most profitable services and maximize productivity by handling more projects at one time.”

## RESULTS FOR CLIENT

### Predictable and productive setups that send success rates skyward.

- Get to go-live without zigzagging through turbulent setup procedures.
- Enables clients to ask configuration questions that yield clear, productive answers.
- Ensures that everything is done in the right order via fail-safe setup protocols, preventing frustration and delays.
- Ensures efficient access to help right away.

## BENEFITS TO PARTNERS

### Flight plans that stay on course and on time.

- Access experienced, responsive Wizard X4 consultants who will provide the right help at the right time.
- Frees up the consultant to concentrate on such expert, sophisticated services as charts of accounts and reporting, instead of getting bogged down in 30-60-90-day trial balance setup and other basic tasks.
- Shortens Microsoft Dynamics learning curve for new consultants.
- Gain peace of mind, knowing that a client can work through implementation without doing harm (and the consultant doesn’t have to babysit the process).
- Empowers clients to be very hands-on in implementations, in turn heightening confidence in the entire process—leading to fewer “nuisance” inquiries.
- Gives budget-constrained clients a way to do needed setups now, rather than delaying due to money worries.
- Results in sky-high marks from clients, who will be more inclined to become repeat clients.
- Enables every consulting firm partner to standardize implementations using Wizard X4.



“Wizard X4 gives both consultants and clients an efficient way to configure Microsoft Dynamics systems. This gives the client confidence in the process, and therefore confidence in the setup partner. And gives the partner a way to offer more value-added consulting.”

Chris Conway  
Principal  
Evolutionary  
Business  
Solutions, Inc.

## **Project**

Microsoft Gold Certified Partner Echelbarger, Himebaugh, Tamm & Co., P.C. (EHTC), utilized the Wizard X4 Productivity Suite™ to help client Model Die & Mold, Inc. update systems and software with Microsoft Dynamics SL. Wizard X4 helped automate the implementation and ensured smooth importing of legacy records.

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Grand Rapids, Michigan-based Echelbarger, Himebaugh, Tamm & Co., P.C. (EHTC), offers tax, accounting, technology solutions, personal planning, and management advisory services to mid-market businesses, service organizations and individuals.

Model Die & Mold, Inc., is a Grand Rapids, Michigan-based manufacturer of high quality molds and specialty dies. Founded in 1966, the company has grown from a 1200 square-foot garage and two employees to a 65,000 square-foot facility with 60 full time employees. The firm selected Microsoft Dynamics SL System Manager, General Ledger, Accounts Payable, Accounts Receivable, Purchasing, Inventory, Project Controller, and Allocator modules.

## **CHALLENGE**

### **EHTC needed to get Model Die & Mold to cruising altitude on a cost-effective Microsoft Dynamics SL implementation.**

“To be timely and cost-effective, we needed to find software that expedited the implementation of SL modules and facilitated importing of general ledger data,” says David Echelbarger, EHTC President. The challenge was compounded by the need to adhere to strict budget boundaries while developing a solution that would substantially enhance productivity—and therefore profitability—going forward.

## **SOLUTION**

### **Wizard X4 Productivity Suite™ enabled a smooth takeoff and use of ‘automatic pilot’ to expedite processes.**

“We recognized that the Wizard X4 Productivity Suite™ could enable Model Die & Mold to assist in the implementation,” adds Echelbarger. “Historically, our business model has been to partner with clients. This solution enabled us work hand in hand with Model Die, and efficiently achieve successful implementation on a strict budget.”

The iConsultant® automated process guided proper loading and SQL configuration of the SL modules while ConvertMSTR™ helped edit, convert and import legacy general ledger transaction data—including Chart of Accounts, Customer & Vendor Master Records and GL Historic Transactions—into the new system.

## **RESULTS FOR CLIENT**

### **Fast ascent and ROI without sacrificing economy.**

- Wizard Productivity Suite let Model Die & Mold help with the implementation by answering the iConsultant® structured series of questions and following examples and recommendations for configuration of the new Solomon modules.
- Wizard X4 provided Model Die & Mold visibility and access to sensitive, critical legacy data—reducing the cost and time of future data analysis and reporting.
- EHTC successfully implemented the new Microsoft Dynamics SL modules in 55 hours of consulting time, including 20 hours of custom report writing. This enabled staying within strict budget constraints.
- Wizard X4 helped Model Die achieve efficiency and profit improvement goals.

## **BENEFITS TO PARTNERS**

### **Sky-high competitive edge. Smoother flight. On-time landing.**

- Increased customer satisfaction.
- Ability to compete for contracts that otherwise would be rejected because of cost.
- Enables consultants to provide highest-value services while staying within budget.
- Flexibility to manage implementation without getting bogged down in routine details.
- Helps ensure “going live” on time.
- Enables consulting firms to do more with fewer people.
- Makes a strong sales case to the Microsoft Partner client in two ways: 1) saves money, time, and sanity upfront; 2) leads to higher productivity and profits post-deployment.
- Promotes collaborative interaction between Microsoft Partner and client—instead of one party shouldering the vast majority of the responsibility. This collaborative, highly cost-effective model lights the runway to future engagements and referrals.
- Wizard Productivity Systems, LP’s comprehensive support backs up consultant’s systems, policies and procedures—elements key to safe and successful flight.



“The Wizard X4 Productivity Suite™ saved us hours in implementation costs and reduced the total cost by roughly 30%. Wizard’s offerings helped us choose the ‘right’ system for our needs and enabled us to rapidly realize the benefits of our new Microsoft Dynamics SL system.”

*Karen Crawford  
Accounting  
Manager, Model  
Die & Mold, Inc.*

“Because of budget constraints, without Wizard X4 this customer would not have been able to get the best solution for their needs. Wizard Productivity Systems helped us have a satisfied customer.”

*David Echelbarger  
President, EHTC*

## **Project**

Microsoft Partner Inscio, LLC utilized the Wizard X4 Productivity Suite's productivity-enhancing tools to secure a Microsoft Dynamics GP contract with Hewlett-Packard OEM manufacturer Fong Kai Industrial Co. (FKI). The installation included core financial accounting, supply chain management and project accounting.

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Dallas-based Inscio, LLC delivers ERP software from Microsoft. They sell, implement and support Microsoft Dynamics GP and related business applications. Inscio serves a broad range of customers and industries that typically face the similar challenges of aligning their technology strategies with their business objectives to survive and thrive.

Dallas-based Fong Kai Industrial Co. (FKI) handles engineering and distribution and oversees outsourced manufacturing for HP server exterior cases and other engineered-to-order products. The company purchased Microsoft Dynamics GP Foundation Layer, Smart List Builder, General Ledger, Payables, Receivables, Project Accounting, Payroll Connect For ADP, Sales Order Processing, Inventory Control, Purchase Order Processing, Landed Cost, and Modifier modules.

## **CHALLENGE**

### **Inscio needed to develop an ultra-efficient flight plan to land a Microsoft Dynamics GP installation ahead of MAS90 competition.**

In so doing, Inscio still needed to make the installation profitable. And there was the omnipresent concern about self-implementation,. While typically more cost effective, it has inherent competency risks. Finding the sweet spot between low price and high performance (both in the implementation process itself and resulting capabilities) was the challenge facing Inscio to land the Fong Kai contract.

## **SOLUTION**

### **Already told the competition had won the contract, Inscio re-engineered its bid using Wizard X4, and made the deal fly.**

"They reviewed the Wizard X4 Productivity Suite™ and felt comfortable with the way it was working. It could reduce hours significantly without creating too much risk for them. We offered to take services down to less than 100 hours (from 222), which would cover software installation, upfront planning and some training. They could finish the installation themselves," notes Inscio principal Brian Gallagher.

"They got more bang for the buck with the Microsoft Dynamics GP technology, coupled with an economical installation," notes Gallagher. In less glamorous terms, they got it fast, cheap AND good. How much better does it get? "This was particularly reassuring to Fong Kai, an emerging company that has changed its manufacturing model from on-site to outsourced overseas—with all the changing requirements and complications that go with it."

## **RESULTS FOR CLIENT**

### **Fong Kai updated systems with the most compatible technology—and arrived at its destination fast, affordably and comfortably.**

- Got the product and Microsoft Partner they wanted (and valued) at a much lower price than the competitive product.
- Facilitated implementation of SharePoint, which Fong Kai already owned.
- Provided greater scalability than competitive product.
- Made implementation much more efficient.
- Reduced risks inherent in these types of installations—from cost overruns to under-achieving installation specialists.

## **BENEFITS TO PARTNERS**

### **Sky-high competitive edge. Smoother flight. On-time landing.**

- Enables bringing in a junior consultant, who can get up to speed quickly and start billing hours—without having to fret the quality of work for that new client.
- Enables every consulting firm partner to standardize implementations using Wizard X4.
- Proves highly attractive to budget-constrained companies.
- Speeds up routine implementation procedures, freeing up time—as much as 40 hours per installation—to pursue higher-value services.
- Makes happy customers, who gladly will spread the word to others.
- Amortizes business development time spent to get the contract, while still turning a profit at the end of the day.
- Supports consultant's ability to get and handle the installation with Wizard Productivity Systems' comprehensive customer service team and systems—elements key to safe and successful flight.



**"The Wizard X4 team was very responsive to help get the sale. If they hadn't snapped to it, it wouldn't have worked. They got on the phone with me and my team, set up a client presentation, and did it the next day. If we wouldn't have executed together the way we did, we wouldn't have gotten the contract."**  
**Brian Gallagher**  
**Principal,**  
**Inscio, LLC**

## **Project Partnership**

New Vision Consulting Group, Inc. and Wizard Productivity Systems complement each other perfectly. New Vision's overarching mission is to help businesses use technology effectively, eliminating client frustration and system ineffectiveness along the way. Wizard X4 Productivity Suite is a powerful, proven tool that streamlines Microsoft Dynamics setups. New Vision uses Wizard X4 to facilitate its Dynamics SL implementations.

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**New Vision Consulting Group, Inc.** Edmond, Oklahoma-based New Vision Consulting Group is a premier, Microsoft Gold Certified Partner specializing in project and accounting system implementations for project-driven organizations. Founded in 1997 by Kreg Decker, New Vision is one of Oklahoma's fastest growing companies and has gained a nationwide presence for its expertise in project centric firms—with particular focus on architectural, engineering and construction industries.

Decker brings his love of family, church and community to his company. New Vision's core values concentrate on effective, honest communication, valuing of everyone's contribution to goal attainment, and infusing innovation, excellence and enthusiasm into every facet of the company's operation.

## **CHALLENGE**

### **Make all Microsoft Dynamics SL setups fly the same route.**

New Vision Consulting Group wanted to standardize all Dynamics SL setups to create predictable results on a consistent timetable. By having this standardization, any partner team member could step in at any time and ensure the same outcome.

## **SOLUTION**

### **New Vision and Wizard partnered to chart a replicable flight path.**

New Vision Consulting Group uses the Wizard X4 Productivity Suite as an “internal standardization tool,” enabling a consistent and repeatable process. “It does a really good job. It’s built to walk you through the entire setup process methodically. It’s exactly what we needed to make Dynamics SL implementations consistent, and ensure an on-time touch down to go-live,” says Kreg Decker, New Vision founder and president. “Anytime I need to know the percentage of a setup that’s completed, I get an accurate answer—not just a round number. That’s the number one value for us.”

## **RESULTS FOR CLIENT**

### **Predictable setup outcomes that establish client certainty.**

- Smooths out the proof phase process instead of jumping around and not having everything set up that’s needed.
- Establishes clear procedures, timelines and expectations both for clients and consultants.
- Augments clear setup processes with on-demand Wizard X4 developer assistance, heightening comfort both with the partner and product.

## **BENEFITS TO PARTNERS**

### **Consistent setups that make client confidence and comfort soar.**

- Provides a fail-safe alternative if a consultant or client contact exits the setup for any reason—as another can step right in without missing a beat.
- Makes newer team members essentially as productive as the more experienced consultants.
- Bolsters prospect interest because of its straightforward, easy-to-understand setup protocol.
- Conveys a strong, confident image of being organized and completely in charge of the setup—a substantial competitive advantage.
- Offers the most efficient setup path, optimizing use of client budget for routine items—and opening new avenues of higher-level consulting.
- Enables a client to work through implementation without fear of taking a wrong turn.
- Creates a self-teaching environment for clients, minimizing time-consuming how-to questions.
- Results in sky-high marks from clients, who will be more inclined to become repeat clients.



*If I need to know exactly where we are in the process, I can get an accurate answer. That's the number one value for us. It's amazing how Wizard X4 has incorporated all the setup issues and decisions. For new consultants, it's the best tool to help learn to set up the product quickly. For existing consultants, it's a standardized way to make sure everybody does it the same way."*

*Kreg Decker  
Founder and  
President  
New Vision  
Consulting  
Group, Inc.*

## **Project**

Microsoft Gold Certified Partner Roux Business Systems, LLC utilized the Wizard X4 Productivity Suite™ to implement a Microsoft Dynamics SL ERP solution for Situs Companies, a professional services firm.

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**Roux Business Systems, LLC** is a New Orleans-based professional consulting firm specializing in integrated financial and project accounting solutions for small to medium sized, project-centric clients. Roux principals David Siegel and Matt Hunt stay hands-on with every client installation.

**Situs Companies** is a Houston-based professional services company offering integrated real estate/business consulting, mortgage loan origination/servicing, property management/leasing and commercial property and investment sales services. The company purchased Microsoft Dynamics SL GL, AP, AR, Cash Manager, Currency Manager, Multi-Company, Project Controller, Allocator, Flex Billings, T&E, Communicator, Employee Utilization, Business Portal with Project Viewer, and Project Analyzer modules.

## **CHALLENGE**

**Microsoft Partner Roux Business Systems needed to go wheels-up on Microsoft Dynamics SL installation for Situs Companies—while simultaneously handling two other major implementations.**

“Wizard X4 Productivity Suite™ optimizes our ability to provide higher value services such as requirements analysis, architecture, design and advanced configuration while ensuring that routine configuration, data entry and data conversion challenges are met. That’s where we can be most effective and efficient for our clients,” notes Roux Principal David Siegel. “Since we weren’t bogged down in routine processes, we were able to be in several places at the same time. Ultimately, that leads to happier clients (because we’re dedicating our best resources and making their lives easier at the same time), and the ability to expand our scope of business without having to hire additional talent. This model makes us much more cost-competitive, while enabling us to maintain the high quality that leads to ensuing engagements and regular referrals.”

## **SOLUTION**

**Wizard X4 helped meet installation performance requirements – all while keeping costs well-grounded.**

“Situs was looking for a collaborative approach,” adds Siegel. “*iConsultant®* proved to be the perfect ‘flight simulator.’ It allowed Situs in-house specialists to make a lot of decisions about setup and initial configuration of the systems on their own. There’s one interface, instead of going back and forth between help screens. This streamlined the process, encouraged the highly collaborative setup – and enabled us to fulfill commitments for three clients simultaneously.”

## **RESULTS FOR CLIENT**

**On-time. Cost-effective. Minimal turbulence.**

- Ramped up quickly with 5 concurrent users plus 150 Business Portal users.
- Helped address logical structuring of account classes and categories to meet Dynamics SL database requirements.
- Guided the user through the proper sequence for entering critical setup and configuration information.
- Saved a great deal of manual entry time using Wizard X4’s ConvertMSTR™ component—which enabled uploading of large data files.
- Allowed configuration of Dynamics SL modules with ease.

## **BENEFITS TO PARTNERS**

**Smoother flight. Perfect landing.**

**Sky's the limit for future engagements.**

- Enables smaller consulting organizations to leverage resources in multiple projects simultaneously.
- Enables Microsoft Partner to work with smaller clients, for whom even moderately complex implementations would otherwise be cost-prohibitive.
- Enables smaller consulting organizations to compete with larger organizations by offering optimized resources and processes.
- Promotes collaborative interaction between Microsoft Partner and client.
- Adds value to the Microsoft Partner’s services.
- Wizard Productivity Systems’ comprehensive support backs up consultant’s systems, policies and procedures.



**“Overall, the support was very good. I feel that both companies [Roux and Wizard Productivity Systems] took ownership in the project and were always available to answer questions and give support.”**

**Deina Arteaga  
Assistant Controller, Situs Companies**

**“Wizard’s support was terrific. Where there were problems and bugs along the way, the Wizard team jumped on everything and responded magnificently.”**

**David Siegel  
Principal,  
Roux Business Systems, LLC**

