International aid arrives faster and more efficiently with Microsoft Dynamics 365 for Finance and Operations

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Executive Summary

How does a global company with field offices in many of the most challenging and far-flung locales in the world establish reliable technology systems that offer collaboration, data archival, and reliable business insights across the entire company? Leaders at Chemonics wanted faster, more efficient systems so field staff could focus more on providing technical assistance to improve the lives of people in developing countries. For the speed and flexibility needed to move forward, Chemonics leaders chose Microsoft Dynamics 365 for Finance and Operations implemented by a highly experienced Microsoft Gold Partner, SAGlobal.

Background

When Chemonics launched the Rwanda Family Health Project, its mandate was clear: Begin supporting hospitals and community health facilities nationwide within three weeks. Chemonics staff had to race to hire and onboard new staff, set up internal management systems with the ability to communicate and collaborate with the home office, establish 178 grant agreements, and start providing assistance. This is the typical day-in-the-life of a Chemonics employee-fast-paced, results-driven, and striving to promote meaningful change around the world to help people live healthier, more productive, and more independent lives. From its founding in 1975, Chemonics has worked in more than 150 countries to help clients, partners, and beneficiaries take on the world’s toughest challenges. Today, Chemonics reimagines global supply chains to deliver essential medicines to the right place at the right time. The company operates on the knowledge that effective governance and accountable institutions are critical to alleviating poverty and achieving sustainable results. Chemonics embraces project management as a discipline, not an afterthought, so their clients get maximum impact for minimum risk. And, they apply lessons learned across all projects globally, bridging gaps between different technical fields to ensure results-driven solutions.

When it was time for the growing employee-owned international development consulting firm to address maximizing its global operations, corporate leaders searched for technology that could realize this critical mission while meeting...
the specific requirements of a U.S. government contractor—all while delivering the speed and efficiency of a unified core system. To implement this system, they looked for a consulting partner with the right experience and capability with the solution, as well as the right people and processes to successfully deliver this complex project.

Aiding developing countries requires speed and flexibility

In the first few weeks after Chemonics takes on a new project, a field office must be set up many times in remote or conflict-ridden environments. Once the project’s improvements are accomplished, the offices are broken down and the company withdraws. Chemonics currently has offices in more than 70 developing countries, with each office supporting a staff as small as 3 or as large as 300.

Chemonics management systems were originally designed to accommodate places with poor communications and Internet connectivity. Project management, finance, HR, and procurement systems traditionally made workflows and information aggregation difficult and time-consuming for employees, and real-time collaboration basically impossible. Without access to current data, forecasting and resource planning was very challenging. Chemonics Executive Vice President Eric Reading says, “As the company geared up for new opportunities, we needed a new, unified core system that would better serve our organization’s business complexity and give us the speed to enable continued growth.”

Based on its communication challenges, Chemonics needed technology that didn’t require on-site servers, and it wanted software to span the entire lifecycle of projects, linking opportunity tracking, bid and proposal management, project initiation, project management, and delivery. The company also needed software that would link project flow to human capital management, onboarding, budgeting, and billing for easier business insights and better accuracy. In addition, Chemonics wanted a single platform that made it easier for team members to be deployed across different roles and field offices. Finally, that system had to meet stringent compliance requirements around cost allocations, client billings, and global financials as well as recording and archiving documentation within federal contracting compliance standards so audits were never a concern. “Over time, we realized we needed a single integrated solution that would allow us to operate as a unified, global organization,” says Rob Teitelbaum, Controller at Chemonics.

Microsoft Dynamics 365 for Finance and Operations in the cloud offers business flexibility

An RFP process revealed that there was only one solution that met all these requirements Microsoft Dynamics 365 for Finance and Operations. The solution made scaling easier, offered an advanced level of integration across functions, provided easy access to data from anywhere across the globe, and did all this while fulfilling the specific data-management requirements of a U.S. government contractor. Microsoft engaged leading international Dynamics 365 consultancy, SAGlobal, to lead the implementation project based on their strong experience delivering global Dynamics 365 solutions.

This implementation will enable the company to finally operate as a global company rather than as a collection of semi-autonomous offices. “In the past, our technology was site-specific because that was the only option,” says Teitelbaum. Reading agrees, saying, “Technology has evolved to fit our business case. It was extremely difficult to deploy in an on-premises format in the 70 developing countries where we work, and we didn’t have the connectivity we needed for real-time collaboration with our headquarters offices. The cloud
technology and the Internet connectivity came together at the same time to make this solution possible.”

Integrated processes lead to better visibility into the business

Data will be accessibly stored and archived accurately in real time as projects move along, making business analysis faster and more accurate than ever before. Teitelbaum says, “Up-to-date and accurate data will be easily accessible for visibility into the business at any time, because records will be accessible even after a project office is closed.” With access to data from all field offices within Power BI, forecasting and business planning reports can be automated, allowing Chemonics to plan in real time to deploy the resources necessary to make projects like Rwanda Family Health successful from the get-go.

With Dynamics 365 for Finance and Operations, project flow will be much less manual. Work plans developed for a proposal easily turn into projects that can connect to HR, procurement, and billing systems all without re-inputting information into different systems. And it’s all in the cloud. Contacts are shared globally across the company with Microsoft Dynamics 365, and collaborative project flow is simplified with Microsoft SharePoint.

Faster office setup offers operating speed and flexibility

Dynamics 365 for Finance and Operations can be configured for offices of varying sizes and can function in online and offline situations. Additionally, it will allow offices to be set up and scaled down easily with each contract. Says Reading, “Rather than having to set up business processes, install servers, and configure software, teams will deploy new instances of our cloud-based systems instantly. And the flexibility in licensing offers access to all modules. For instance, in a three-person office, we might have someone working in the HR system and a procurement system, where in a larger office those might be managed totally separately. And if we have a surge in work, we can allocate more people to different tasks without the administrative task of buying additional licenses.” And since the Microsoft Office 365 interface was already familiar to employees, access to all tools within a single, integrated user interface makes work faster and easier.

Increased employee satisfaction and better customer care

Teitelbaum says, “Because Dynamics 365 for Finance and Operations is a global solution that fosters increased collaboration and reduces administrative work, we’re going to better meet the needs of our employees, and in turn we’ll deliver better service to customers.”

Reading agrees, saying, “Dynamics will increase staff satisfaction, allowing employees to focus more on the work they’re passionate about, and in the end we’ll provide the ultimate outcome helping people live healthier, more productive, and more independent lives.”

Because Chemonics is an employee-owned company, employee satisfaction with the new tools is paramount. Reading and Teitelbaum are working closely with Microsoft Customer Success Manager Mark Schubert to build change management into the process with dedicated stakeholders and resources to ensure successful adoption. Says Reading, “In our business, success metrics are as dependent on speed, effectiveness, and sound recordkeeping as they are on pure cost savings, so we’ve had to develop new KPI options. Mark has
helped us do that, and our partnership with Microsoft has helped us make progress.”

Chemonics is in mid-implementation, working closely with partner SAGlobal. Says Reading, “SAGlobal has worked with Microsoft Dynamics 365 for many years, understands the opportunities and pitfalls of ERP implementations, and helped us see the best way to get through our implementation. We are grateful for their experience, and are benefiting from it.” Adds Teitelbaum, “During our evaluation, SAGlobal was willing to travel with us to Haiti and the Dominican Republic to see firsthand the challenges that our field offices face, and we appreciated that commitment.” Chemonics anticipates rolling out the Microsoft solution to their field offices later this year, and then implementing project management, data integration, and records management across the entire company in 2018.

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