



Customer Success Snapshot



COMPANY:

BGSF

INDUSTRY:

Professional Services

- Staffing and Recruiting

ERP:

Microsoft Dynamics 365
Finance and Operations

ABOUT BGSF:

With its home office in Plano, Texas, BGSF provides workforce solutions to a variety of industries through its various divisions in IT, Cyber, Finance & Accounting, Creative, Real Estate (apartment communities and commercial buildings), and Light Industrial. BGSF has integrated several regional and national brands achieving scalable growth. The Company was ranked by Staffing Industry Analysts as the 70th largest U.S. staffing company and the 50th largest IT staffing firm in the 2020 updates. The Company's disciplined acquisition philosophy, which builds value through both financial growth and the retention of unique and dedicated talent within BGSF's family of companies, has resulted in a seasoned management team with strong tenure and the ability to offer exceptional service to our field talent and client partners while building value for investors.

Solver was the budgeting tool that we needed to help us improve our painful processes. Now, budget season is almost a breeze!

*Nycole Rosen,
VP of Technology*



THE CHALLENGE:

BGSF deployed Microsoft Dynamics 365 Finance & Operations (D365 F&O) and needed more advanced and flexible budgeting, forecasting, reporting and analysis capabilities than what was provided out of the box in D365 F&O. These processes were handled manually in an Excel model that had many driver-based calculations. There was also a need to forecast on a more frequent basis in order to have more organizational control and visibility to operations.



THE SOLUTION

Our Microsoft Dynamics 365 Finance and Operations (D365 F&O) implementation partner recommended Solver as the appropriate tool to meet our reporting and budgeting needs. We also considered Tableau for reporting. Our previous budgeting process included spreadsheets which were updated and managed manually.

What data do you integrate into Solver and how are you using it?

Only D365 F&O data currently. We use the financial “actuals” to compare to the budget/forecast to manage our business.

What benefits have you realized since implementing Solver?

A much faster and accurate budget for all our departments and operations budgets. The reporting that is built in and integrated into the budget tool makes comparison and management much easier than our previous manual processes.

How long did it take to implement Solver?

Implementation was about two months, with some support post go-live to modify and update our budgeting templates.

What was the learning curve for power users?

Because one of our Power Users has a reporting and analytical background, he found Solver to be easy to learn, once he completed the training and spent some time on his own getting familiar with how it works.

What are the best features of Solver? What have users been most excited about?

The budgeting templates and ability for end-users to update their budgets ad-hoc.



THE RESULTS

How has Solver streamlined your CPM processes?

Submitting budgets each quarter no longer requires coordination of a shared document. Everyone can access Solver on their own time and make adjustments when it's convenient for them. This results in a more accurate budget since people are more likely to keep it up to date.

What's next for your expansion of Solver?

We may add additional financial reports to Solver once we have a few other systems in place.

What is the return on investment (ROI)?

Hard to quantify, but significant.

Do you have any advice for a company that is evaluating Solver?

Make sure that you have a product owner to fully dedicate their time to learning the system and providing support to internal users. There is likely more capabilities of the tool that you can take advantage of.