



Microsoft Dynamics Customer Solution Case Study

Wakefield refines IT operations and reduces costs with Microsoft Dynamics™ AX

Overview

Country: Canada

Industry: Lubricants

Customer Profile

Wakefield Canada Inc. is a recently created sales and distribution corporation that provides sales, marketing and distribution capabilities for the Castrol brand of automotive oil and lubricants.

Business Situation

Wakefield wanted to migrate from the legacy main frame systems to a more nimble and streamlined IT software architecture that was fully integrated and used a common suite of applications software.

Solution

To transform the company's technology infrastructure Wakefield decided that Microsoft Dynamics AX was the ideal foundation for its present business needs and future goals.

Benefits

- System Integration
- Improved Efficiencies
- Streamlined Applications

“We're enabling timely decision making as we now have real time business information. Staff will also be able to access this information on their mobile devices, which is huge boost for effectiveness and efficiency of our remote workers.”

Don Weston, Director, Business Technology, Wakefield

Wakefield Canada Inc. is a strategic business partner of British Petroleum and provides marketing and distribution for the Castrol brand of premium lubricants in Canada. Wakefield Canada delivers annual sales of over \$100 million with over 110 employees across the country. Wakefield sought to transition from a technology environment of disparate legacy systems to a more modern and streamlined IT architecture. With the help of Microsoft® Gold Certified Partner Tectura Corp., Wakefield selected and deployed Microsoft Dynamics™ AX. Since implementing the technology, Wakefield has been able to standardize on a core solution, streamline its business processes and enable employees with better access to critical sales and performance data. The IT transformation to the Microsoft Dynamics AX platform has enabled Wakefield to achieve a Total Cost of Ownership (TCO) that is more in line with its size. It is also scalable for future planned growth.



Situation

Wakefield Canada Inc. is an innovative new corporation with a vision for growth. As a result of other global business priorities within BP, Wakefield Canada was created to fill the need for a national distributor of the Castrol line of premium lubricants within Canada and operates as a separate strategic partner with BP/Castrol.

Wakefield wanted to migrate from the BP technology platform, consisting of legacy main frame systems, to a more nimble and streamlined IT software architecture. “The old legacy systems that we were sharing with BP were not focused on the needs of the Canadian marketplace. This kept us from being effective and efficient,” says Don Weston, Director, Business Technology for Wakefield. “The challenge was to create and set up all of the necessary IT infrastructure in a fairly short period of time. In the end, moving from a shared environment controlled and supported remotely, to managing this whole environment ourselves, was a huge change.”

“We were looking for a solution that was fully integrated and used a common suite of applications software for both the business and operating systems. The overall objective was to completely transform the business from the ground up. To accomplish this, the corporate IT systems that were hosted in other cities needed to be brought in-house.”

Solution

To transform the company's technology infrastructure, Wakefield worked with their trusted partner, Tectura Corp. to implement Microsoft Dynamics AX for its present and future business requirements.

Microsoft Dynamics AX delivers streamlined financial, customer relationship, and supply chain processes to boost productivity and more tightly integrate business processes.

The enterprise solution features Windows authentication and the features of Microsoft Active Directory® directory service to help improve security and privacy and provide greater administrative control over sensitive business data. Microsoft Dynamics AX is also designed to work with familiar Microsoft products like Microsoft Office, SharePoint® Server, and Microsoft Dynamics CRM, thereby helping Wakefield to lower training costs and increase user adoption.

Wakefield is using the solution to improve its finance and wholesale distribution processes. The company was particularly attracted to the reporting and business intelligence role-based features provided by Microsoft Dynamics AX. When fully enabled, it will allow users to gain access to data relevant to making informed business decisions.

“In order for Wakefield to enhance productivity and ease of use, it was important for them to have a standardized and task-centric user interface, which helped enhance productivity and ease of use,” says Sean Brereton, Account Executive, Tectura Corp. “The single sign-on feature to access Microsoft Dynamics AX applications enables the user community to be guided into only those functions that they need to perform, thereby removing all of the other modules from their view. This greatly simplifies the user interfaces and reduces training needs.”

Wakefield implemented the solution over a nine month period. With help of Tectura and their project implementation methodology, Wakefield created a new data warehouse and business intelligence (BI) solution based on Microsoft SQL Server™ 2005 and Microsoft Office Excel® 2003. Microsoft Dynamics AX uses standard adapters based on Microsoft SQL Server Reporting Services enabling ad hoc reporting for Wakefield employees. As a result, Wakefield staff will shift from

transactional activities to data management and analysis.

“The vision was to develop a new business management environment completely based on Microsoft technology, starting from the servers right to the value-add applications such as Business Intelligence and Microsoft Dynamics™ CRM. Microsoft Dynamics AX provides the core technology which enables us to do this. We were moving off a transactional-based system, so moving to a Window-based environment is a huge plus,” says Weston.

Benefits

Once deployed, Microsoft Dynamics AX provided Wakefield Canada with the opportunity to transform the way it conducts business. The solution delivered a cost-effective alternative to maintaining the previous IT environment. Wakefield’s employees and managers in operations, finance and IT are now more efficient, and the new system provides a solid foundation for future growth.

System Integration

As a result of standardizing on a single platform, Wakefield is able to better track business data and share it across the entire operation. The solution allows them to leverage the BI solution to build a sales reporting system that will be delivered to the sales team via Microsoft Dynamics CRM. The company now has access to a tremendous amount of data for analysis and reporting, all using a single version of data. Fewer manual entries and less duplication mean staff at Wakefield can be more productive.

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Improved Efficiencies

Wakefield was able to improve efficiencies through enhanced communication and collaboration with standard out-of-the-box capabilities. By creating a single view across transactions, analysis, work flows and documents, employees are able to do their jobs more efficiently.

“We’ve witnessed tremendous efficiencies between various operating groups within the office. The new system really enriches our collaboration activities,” says Weston. “For example, our order desk and warehouse teams are using the technology to reduce duplication and streamline the delivery process. Having everybody working on one common system is by far a much better environment for us.”

Streamlined Applications

Microsoft Dynamics AX has helped the company to standardize its business processes and improve overall operational efficiency.

“We’ve gained real operating efficiency by having all information in one central location. Having that one user interface provides tremendous value to us, in that you really only have to train staff once and then they can move through the entire suite of Microsoft software. We could have never achieved that if we had followed the old approach and continued to use separate systems, each behaving totally differently,” says Weston.

With the core technology in place, Wakefield can now prepare for future growth in sales and innovation. “You have to get the foundation built before you can start building the second story. Microsoft Dynamics AX enables us to achieve our vision.” And, as a result of this vision, Wakefield Canada was awarded the Microsoft Pinnacle Award which

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recognized their use of multiple Microsoft solutions to drive overall business performance across the entire organization.

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to: www.microsoft.ca/dynamics

Canadian case study = Canadian web site

Software & Services

- Microsoft Dynamics™ AX
- Microsoft SQL Server™ 2000 & 2005
- Microsoft Operations Manager
- Microsoft Dynamics™ CRM
- Microsoft Office Outlook® 2003

Partners

- Tectura Corp.

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