



Association Management Company Brings Accounting, Productivity to the Cloud

Dynamic Communities is the independent administration organization behind professional associations and software user groups such as the Dynamics AX User Group (AXUG), the Dynamics GP User Group (GPUG), the Dynamics CRM User Group (CRMUG), and the Dynamics NAV User Group (NAVUG). Altogether, the organization includes some 22,000 members across 32 countries.

Results

- Simplify IT support and access through hosted model
- Ease reporting, cut month-end close by two weeks
- Improve business insight
- Free time to focus on customers and growth

Industry

Nonprofit

Country or Region

United States

Customer Size

21 employees

Number of Users

3 for Microsoft Dynamics GP
21 for Microsoft Dynamics CRM

Connect with Dynamic Communities

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Andy Hafer, CEO, Dynamic Communities

There's a real business behind many user groups. But as Andy Hafer, CEO of Dynamic Communities, points out, it's in the best interest of association management companies like his own to remain invisible. Managing seven groups for Microsoft Dynamics ERP and CRM products and more than 1,200 related events per year, Hafer says, "Not many people see us—and that's by design. We try to keep the administration behind the scenes, so our members can engage in our value-added services and with each other."

It is in this spirit that Hafer and his team of 20 employees work hard to make membership and the experience of their events—which range from conventions to user training and webinars—increasingly streamlined, so members can focus on the event at hand. To that end, Dynamic Communities is continually looking for ways to optimize its own operations. And with membership growing nearly 100 percent year over year for the last three years, company leadership decided it was at last time to deploy a full-fledged enterprise resource planning (ERP) system.

Hafer notes that he made the decision to move to a more robust package when the demands on reporting simply became too much for their previous combination of QuickBooks and spreadsheet-based accounting. He says, "To get insight into our business we had to rekey information from our CRM system, which we used for membership management, back into QuickBooks. Running a report, such as month-end, could take as long as three weeks, if it happened at all."

Slow reporting also meant an overall lack of business insight; and for Hafer, insight is absolutely critical. "We have to be good stewards of our member's investments," he says. "We have to make sure that the treasuries collected are driven back into the group from which they originated. We also strive to give our groups the benefits of economies of scale when



Andy Hafer

CEO, Dynamic Communities

While using Microsoft Axapta in his role as CIO for a manufacturing company, Andy Hafer founded the Axapta User Group in 2003 to help people build their knowledge around the platform. Following the growth of the organization, Hafer decided to quit his day job and focus full time on association management. Now the CEO of that group, which has since been renamed Dynamic Communities and expanded to include support for professional organizations around all Microsoft Dynamics products, Hafer has most recently led the deployment of Microsoft Dynamics GP for his own company and met tremendous results. He says, "Microsoft Dynamics GP 2013 offers all the capabilities we needed, and a hosted deployment model that makes financial sense for a business like ours."

Connect with Andy Hafer



costs can be shared among them. But this leads to complex accounting and QuickBooks couldn't keep up any longer. We were having to run our business on best guesses."

Choosing Microsoft Dynamics GP

In looking for a new accounting solution, Dynamic Communities had three major business requirements:

- **Not-for-profit focused.** While needing to account for each user group as a not-for-profit, Dynamic Communities also needed to be able to manage comingled funds, for instance, if funding from a sponsor was to span multiple user groups.
- **Accessibility.** With 21 staff working remotely, either from home or from the events they help manage, remote access to data from the system was a necessity.
- **Ease of integration.** To eliminate data reentry and drive efficiencies, the company needed a solution that could be easily integrated with Microsoft Dynamics CRM, which it uses for membership management.

With these requirements in mind, Dynamic Communities chose Microsoft Dynamics GP 2013. While the solution provided the not-for-profit accounting capabilities the organization needed, both out-of-the-box and through the wide availability of add-on solutions, it also worked well with Microsoft Dynamics CRM and could be made available as a service through hosting with a Microsoft partner. In addition, the solution's latest release offers a new Web-based client, meaning Dynamic Communities can avoid using remote desktop and simply access Microsoft Dynamics GP through the web.

Managing Events

Since deploying Microsoft Dynamics GP, membership and event management has become a seamless and fully integrated activity for Dynamic Communities. Beginning with Microsoft Dynamics CRM, staff can track members, membership, and events. They can also track member requests, such as the need for an event on a certain topic. Using Microsoft Dynamics CRM as a content management system, Dynamic Communities can also use the system to post event information to its blogs, websites, and member portals.

As membership fees are invoiced and paid, or as events come to fruition, Microsoft Dynamics GP then tracks all the appropriate data. Through the use of two add-on solutions, Olympic Systems Project Cost and Dynamic Budgets, Dynamic Communities can produce very accurate event profit and loss statements within Microsoft Dynamics GP. Says Hafer, "As expenses and revenues come in, they are now automatically associated to that event even if we have an event that spans multiple user groups."

Dynamic Communities' Technology Environment

ERP system	Microsoft Dynamics GP 2013
ERP Add-Ons	Microsoft Management Reporter 2012 Olympic Systems Project Cost Dynamic Budgets Rockton Software SmartFill
CRM system	Microsoft Dynamics CRM
CRM Add-Ons	Click Dimensions eMail Marketing Engine InsideView
Communications infrastructure	Microsoft Lync 2010
Productivity Tools	Microsoft Office 365
Distance learning and Web Meeting Platform	Citrix Go-to-Webinar Cisco WebEx

Going "All-In" with the Cloud

At the same time the company decided to take advantage of a hosted accounting solution, Dynamic Communities also moved to Microsoft Office 365 to bring its productivity and communications tools to the cloud. Together with its Microsoft Dynamics CRM solution, which is also hosted, Dynamic Communities is now fully in the cloud. "When it comes to the cloud, we're all in, and it's not because it's new and chic," says Hafer. "It's because this is the best business approach for us. It's a necessity in achieving the efficiencies we need."

Expanding Access to Information

As part of its deployment strategy for Microsoft Dynamics GP, Dynamic Communities also chose to limit access to the solution. Not wanting everyone in the ERP system, the company was able to instead use SQL Server Reporting Services and the system's native integration with Excel to build reports for its staff that update in real-time.

Additionally, Dynamic Communities went on to provide its staff with Microsoft Surface tablets. Now while at events, such as a trade show, staff can meet with members and prospective members alike and sign them up for an event, a class, or even membership, right on the spot, using Microsoft Dynamics CRM. This information then feeds into Microsoft Dynamics GP to aid in reporting and simplify any related finances.

"The ability to use SQL Server Reporting Services, SmartList Builder, and refreshable spreadsheets to access our ERP data is extremely helpful and they are capabilities that come with Microsoft Dynamics GP right out of the box," says Bob McAdam, VP of Finance for Dynamic Communities. "And it is through this easy access to information that every one of our employees is able to provide our members with the services they might need."

Benefits

While Microsoft Dynamics GP meets Dynamic Communities' need for a more robust accounting system, it has also enabled a transformation of the business by significantly easing IT support requirements, streamlining reporting, improving business insight, and, perhaps most importantly, freeing staff to focus their energy on serving members.

Simplify IT Support and Access through Hosted Model

By deploying Microsoft Dynamics GP through a partner-hosted model and then going on to also deploy Microsoft Office 365, Dynamic Communities brought the last key parts of its IT environment to the cloud. "The subscription style of paying for the investment is key for us," says Hafer. "Operating as a not-for-profit association, all of our income needs to be directed to covering operating costs for our user group programs. We don't have a balance sheet that can afford a big capital expenditure."

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In addition, Hafer goes on to note, “The subscription model also enabled us to establish better compliance with licensing and it made it super easy for our staff who live in other states to have the tools they need—tools that stay automatically up-to-date and that don’t require any in-house IT support.”

Ease Reporting, Cut Month-End Close by Two Weeks

The ability to share event information seamlessly between Microsoft Dynamics CRM and the company’s accounting system, Microsoft Dynamics GP, eliminates reentry of data. While in the past Dynamic Communities had often skipped running month-end altogether, Hafer says, “I could very easily say we have decreased the amount of time it takes to close the books at the end of the month by two weeks; we have gone from it taking three weeks to it easily taking only one.”

McAdam adds, “In terms of ad-hoc reporting, we used to have to ask someone to put these together, which meant days of digging through data. Now, with Microsoft Dynamics GP, all that data is right at our fingertips.”

Improve Business Insight

While the company has eased reporting through easy access to data, the system’s relational database also means that data is more than just data—it is business insight. Explains McAdam, “With a relational database, we can report uniformly and consistently on whatever we need. With a robust and better controlled system, I can now deliver data to my colleagues that helps them truly make smarter and timelier decisions. We can see where we were in the past and make the kind of decisions that will take us into the future.”

Free Time to Focus on Customers and Growth

Looking back on the deployment of Microsoft Dynamics GP, Hafer notes that the return on investment (ROI) comes from the company’s newfound ability to grow. He says, “The ROI of Microsoft Dynamics comes in our ability to grow and do it smart. Before the system, we had to run the company on gut feelings. Now, we know exactly where the biggest bang for the buck is in terms of our groups. Best of all, we can associate our financial information to our qualitative research, such as member feedback, so we aren’t just being smart with the money, but also making sure we are delivering the best service possible to our members.”

Next Steps

- [Connect with Microsoft Dynamics](#)
- [Learn more about the cloud-based deployment model for Microsoft Dynamics GP](#)

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

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