



Linkwood Solutions

Dedicated Microsoft Dynamics NAV Professional Services Partner



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Microsoft Dynamics NAV delivers a bespoke ERP solution for Peter Cox



Peter Cox acquired by Restore Group plc

Linkwood Solutions engaged as the IT Partner

Transformed working practices

Future relationship

- Complex, disparate legacy systems
- New IT infrastructure required
- Advisory and planning sessions to ensure smooth transfer process
- Demo of Microsoft Dynamics NAV
- Revealing initial assessments
- System development
- Remote working efficiencies
- Centralised data assessment
- Scanning and reporting solutions
- New version of NAV allows enhancements
- Microsoft CRM development
- Development of specific systems
- Strong trusted partnership

A change of business ownership invariably has IT implications, with challenges and opportunities in equal measure. For building repair specialist Peter Cox Ltd, acquisition by a new parent company entailed transferring its computer systems to a new platform, and provided the impetus to enhance its business management processes. Linkwood Solutions managed the firm's migration to Microsoft Dynamics NAV, and developed bespoke functionality that has revitalised the IT infrastructure and delivered fully integrated and streamlined operations.

Transition to a new network platform

When Peter Cox Ltd was acquired by business-to-business support services group Restore plc (formerly Mavinwood plc) in 2007, it precipitated creation of a new IT infrastructure. "Our legacy system had been in place for a long time and had become quite complex," says Anne McCallum, company systems and credit manager. "At that point we had standalone computer systems at each of our 14 branches across the UK, so it was also very fragmented."

With everything tied into previous owner Ecolab's global system, a transition agreement was put in place for support on IT and finance. "This gave us time to prepare for the transfer process," explains Jeff Pengelly, senior regional support manager. "Essentially we needed a new network platform, and recognised that it presented a good opportunity to update and integrate the individual IT systems held at each branch location."

PETER COX



Company profile

Peter Cox Ltd is the UK's leading specialist in damp proofing, woodworm and dry rot treatments, and masonry stabilisation. With 60 years' experience, the firm provides high quality repair solutions for private, commercial and public sector properties. The company is headquartered in Manchester and has a network of 12 offices across Britain, employing the largest specialist team in the country.

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Jeff Pengelly

Senior Regional Support Manager
Peter Cox Ltd



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Open development and a close relationship

Through liaison with Restore, Peter Cox was introduced to Linkwood Solutions, acting as the group's internal IT project management team, which began advising the firm on system options. Other parts of the Restore group had started to use enterprise resource planning software Microsoft Dynamics NAV (previously Navision), so Peter Cox was invited to see it in operation and was immediately attracted by the system's features and flexibility.

"Microsoft Dynamics NAV has an open development environment which lends itself well to being customised to fit specific functionality requirements," says Linkwood's managing director Nic Lamb FCA. "This meant we would be able to configure the system to exactly meet Peter Cox's needs."

The first step was to migrate from the company's legacy MS DOS operating system, PROCIS. The assessment process was quite revealing, identifying system overlaps and duplication, including two or three different finance applications, for example, which were being used to achieve the same end results.

"Following the initial assessments, we created a project team with representation from each area of the business to work with Linkwood, and held a series of design meetings where the team would discuss findings and outline requirements. Linkwood then coordinated the development of the solution for us to test and effectively try to break the system before sign off," says Jeff Pengelly.

Flexible platform enables tailored functionality

The majority of Peter Cox's customer contact is by telephone, so the first requirement was for an enquiry system. "Linkwood helped to create a bespoke form for us and have now taken that right through the business," explains McCallum. "We operate scheduling through Outlook and Exchange Central, and have a fully digital filing system."

The system Linkwood helped to create logs enquiries, creates files and puts entries directly onto the sales team's calendar, scheduling appointments automatically. Once a property survey is completed and the surveyor submits

a report, a link uploads the estimate and automatically creates a job task line with the correct financial information on it. "It's a fully integrated solution," continues McCallum. "For years we were doing audits and travelling the country but now we can access data for every branch without leaving the office."

Linkwood was also involved with creating the survey report that Peter Cox produces for clients, explains McCallum. "It starts with an XML document from Outlook which our surveyors can open and click through. They all have PDAs, so all the information they need is to hand and the system enables integration of photos and electronic drawings."

A dedicated team in the Liverpool office now produces the reports with a universal format, so that all branch output looks the same. They also manage the insertion of any technical details or attachments prior to distribution. "We can now deliver reports the same day, instead of it taking three or four days to generate and output with the old system," says McCallum. "Clear presentation and timely delivery are obviously appreciated by customers and give us a competitive advantage."

Data management systems reap intelligent rewards

Pengelly acknowledges that Peter Cox is heavily dependent on figures and reports. "We almost run on numbers, so it was vital to maintain this flow through the integration process," he says. "Linkwood's assistance with implementing data warehousing for our business intelligence (BI), has enabled us to slice and dice information in far greater depth and understand branch performance on an effective live basis."

Successful transition

This was a major undertaking according to Pengelly, particularly regarding the migration of data. "As we closed down each branch for the changeover we had to import raw data from our legacy system PROCIS, which resulted in some pretty hairy moments!"

The project was handled over weekends, with branches closing down at 3pm on a Friday to give Linkwood the opportunity to implement necessary backups, grab data and put it into a format that NAV would recognise. Branch



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staff were able to return to work on Monday mornings to access data and continue operating from it.

"We went through this process 14 times and initially it was quite stressful," Pengelly admits. "Linkwood remained confident though and it did get easier each time. We suspended the process once or twice until the system stabilised but didn't ever have to restore the original data. Considering the magnitude of the project, overall it was a relatively smooth process."

Another anxious moment was the transition to electronic filing. Linkwood introduced EFS Technology (Enterprise Form Solutions), which has enabled branch staff to scan and store invoices and contract documentation. "With the introduction of NAV we took the decision to archive our paper files, and dispose of all the cabinets that held them," says McCallum. "It was a major step really, taking away a comfort blanket, but almost everything is accessed and distributed electronically now, which has streamlined our document handling. In itself that has delivered time and cost efficiencies and it has also notably reduced postage bills and stationery costs."

System efficiencies transform working practices

McCallum says that not surprisingly it was quite a culture shock when the system was first rolled out, but with wide-reaching benefits everyone has embraced the change. "It's quicker, more efficient and certainly a better structure. It was quite a shake-up initially, but we're confident with operating the system now and appreciate its capabilities."

The system has transformed working practices, reports McCallum, delivering advantages for staff at the branches and on the road. "Surveyors are able to organise their work more efficiently and don't have to come into their local office to collect assignments," she explains. "Everything can be viewed electronically in their calendar, including location and what type of survey is needed, along with all the required paperwork as attachments. It's convenient and reduces travel, and means the team can spend longer doing surveys or working on sales development."

Flexible platform yields developments

Linkwood has worked closely with Peter Cox to enhance the system with additional functionality. "We've been able to introduce a scanning solution, a reporting system for our surveyors and a QAS postcode facility to identify the right surveyor for each project location," explains McCallum.

Development of the system is continual, she says, with further progression and enhancements enabled by each new edition of NAV. "We have introduced payroll onto the system, and made the transition from weekly to monthly payments, and we're now looking at improving the way we enter timesheets too."

Linkwood is currently advising on CRM systems. "We've been running tests and it's nearly ready," says Pengelly. "The sales team will be armed with a spreadsheet designed by Linkwood, and our surveyors will input details for the office to upload to NAV. This creates a marketing card within our database, which will alert users if the contact already exists."

Another project in development is the management of multiple enquiries for the same property or location. "We guarantee our building repair work for up to 30 years, so Linkwood is looking at ways to record and cross-reference what we did on particular properties, which could include different quotes, reports and treatments on a single building, potentially over a period of time and for various owners or contacts."

Enduring relationship and a responsive approach

Without its own dedicated IT department, Peter Cox is happily reliant on Linkwood to keep systems running. "Initially we were employed to act as a groups' IT project management team," says Lamb, "and as time has progressed it's become such a close relationship that effectively we operate as an extension of the organisation."

McCallum concurs, and says that this has been key to their success. "One of the enduring aspects of this process is the strong partnership we've formed. Linkwood has led us through the transition, hand-in-hand, and simply put we wouldn't be where we are without them."

Lamb concludes that Linkwood typically acts like a resource agency working from the customer side, rather than as a traditional reseller, and has built its reputation on a personal approach. "We pride ourselves on being very responsive, attending to customer needs during evenings or weekends if necessary. Whatever it takes to resolve issues as they arise."

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