

dogmagroup

My Group Solutions' Journey
with Dogma Group –
**Embracing Automation and
System Integration**



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COMPANY OVERVIEW



COMPANY NAME

My Group Solutions



INDUSTRY

Equipment Sales and Leasing



TECHNOLOGY IMPLEMENTED

Microsoft D365 Business Central



COUNTRY

The UK

ABOUT THE COMPANY

My Group Solutions has been supplying printers, mailing, and security equipment since 1995 from its offices in Greenhithe, Kent. The company provides equipment and services, ranging from single devices to fleets of equipment installed in multiple locations across the UK.

My Mailing Room, My Printing Room, and My Group Security brands all fall under the My Group umbrella, operating under the same ethos of knowledge, quality products, and the best support.

PROJECT SUMMARY

As a growing company, My Group Solutions faced the challenge of **time-consuming manual workflows**, leading to fragmented data when expanding into two new entities. My Group Solutions urgently needed a comprehensive solution to integrate their finance and agreement management systems with their CRM, as their legacy system, SAGE 50, proved to be a significant hurdle.

Tim Pile, Operations Director of My Group, explained, *"We have two other businesses that heavily relied on our outdated existing system and required huge amounts of manual work because the systems were obviously not speaking to each other."*

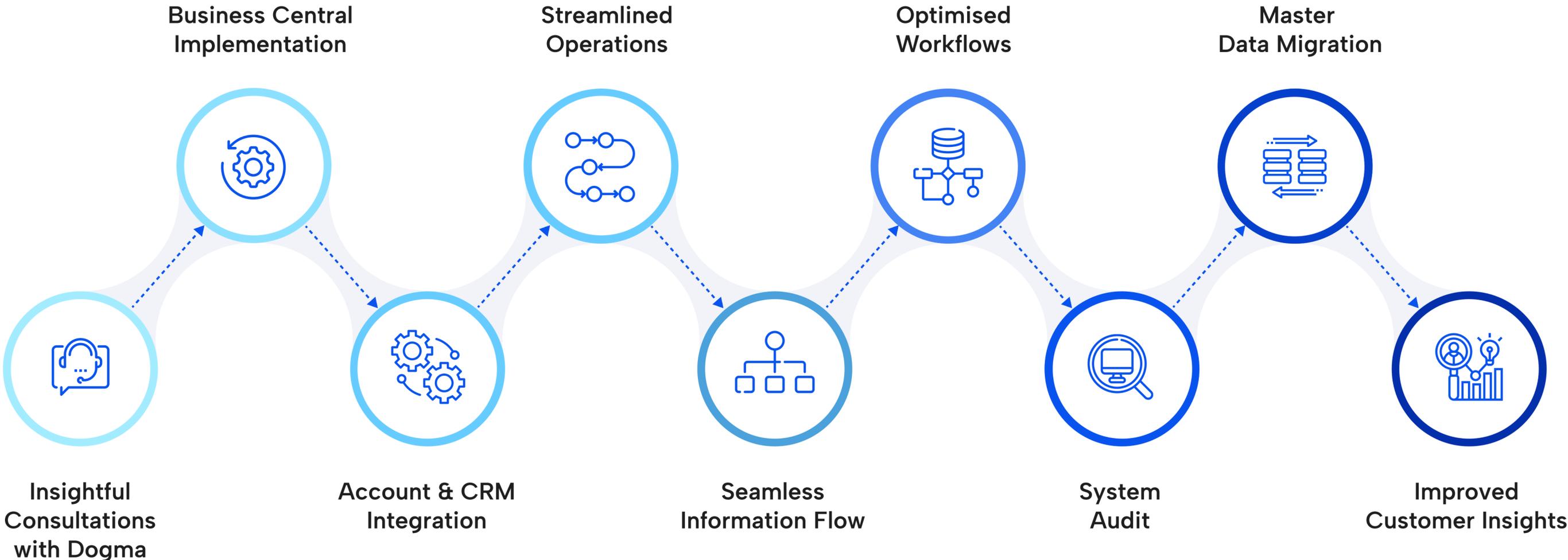
Exhausted by the limitations of their system, My Group Solutions embarked on an extensive search for companies that could liberate them from their struggles. As the search narrowed, they began **insightful consultations with Dogma**, impressed by their expertise in the field. Katie Payne, Customer Experience Manager of My Group,

further added why Dogma became their leading choice, *"Dogma spent much time with us reviewing our existing system, understanding what it was, and identifying priority areas for improvement."*

My Group's transformation journey with Dogma was characterised by collaborative efforts and support. Dogma implemented **Microsoft Business Central**, an advanced solution that harmonised their accounts and CRM functionalities and eliminated laborious manual processes.

"Ever since we've started working with Dogma, we've managed to automate more of that information and regulate a constant flow of that information," Tim said. The transition included a rigorous system audit before migrating to the new system. *"Dogma also developed workflows that allowed us to generate invoicing with our CRM system,"* he mentioned, *"which directly feeds into our accounts and tracks expenditures based on serial numbers."* This functionality has provided them with a profound understanding of their customers.

The partnership between My Group Solutions and Dogma extends far beyond the implementation phase. "Our relationship with Dogma is still very vibrant although remote," Katie stated. "We have transitioned to a support contract with Dogma, significantly reducing our need to contact them." The Dogma team remains responsive, promptly addressing any inquiries or concerns that arise.



RISKS AND CHALLENGES

1. Lack of System Integration:

My Group Solutions struggled with manual data entry and inefficient communication between their CRM, finance system, and agreement management tool. The absence of integration hindered their ability to access crucial information and generate accurate reports.

2. Limited Automation:

Inputting information into the system was time-consuming, affecting productivity. Automating data exchange between CRM and the accounting system became key to improving efficiency.

3. Incomplete Customer Insights:

The absence of reliable statistics and tracking mechanisms prevented My Group Solutions from fully comprehending their customer's needs and effectively managing their equipment sales and leasing businesses.



APPROACH AND SOLUTION



APPROACH AND SOLUTION

Dogma, as a trusted advisor, is dedicated to guiding their customers towards optimal technology solutions. Our **configure-first approach** minimises customisation and reduces costs. Working closely with My Group Solutions, Dogma seamlessly integrated their accounts and CRM, replacing the outdated SAGE system.

A comprehensive audit ensured a smooth transition to Microsoft Business Central and Dynamics CRM. Custom workflows streamlined invoicing, expenditure tracking, and serial number management.

To optimise D365 CRM, Dogma conducted a thorough **health check**, ensuring peak performance and providing improvement recommendations. Seamless information flow was crucial among their legal entities: My Group Solutions (Office Equipment Sales & Services), Nationwide Leasing (Equipment Leasing), and Redford Estates (Property Rentals). Dogma implemented dimensions for **data analysis**, enhanced G/L functionality, streamlined AP/AR management, and efficient bank transactions.

The implementation further included **seamless master data migration**, rigorous user acceptance testing, and comprehensive training. Post-implementation, My Group Solutions benefitted from Dynamics BC's features, including a supplier register, streamlined processes, robust financial management, stock control, VAT accounting, and CRM integration.

For a **sustainable digital transformation**, Dogma provides ongoing support, emphasising open communication to foster higher user engagement. To add, Dogma's remote user training enhanced users' knowledge and skills, resulting in an improved user experience.

This collaboration of My Group Solutions with Dogma successfully delivered an integrated system, optimising operations, information flow, and financial management. Looking towards the future, My Group Solutions embarks on further system development, and Dogma plays a pivotal role in this journey.

"What I like about Dogma is the connection we've built with the team over the project hours," Tim shared. "We wholeheartedly endorse Dogma, and in fact, we are already benefitting from their services."

RESULTS

1. Enhanced Efficiency

Significant time savings—improvements in overall operational efficiency

2. Improved Customer Insights

The ability to track serial numbers within the system—reliable statistics, enabling them to tailor services and offerings more effectively.

3. Enhanced Reporting Capabilities

Generation of reports based on CRM accounts—accurate and comprehensive insights into business performance. Real-time Financial Reporting—valuable insights for informed decision-making

- Comprehensive transactional data visibility with advanced filtering capabilities
- A centralised platform for managing sales and customer data and maintaining a comprehensive customer database
- Optimised sales processes
- Seamless information flow between CRM and accounting systems
- Streamlined Financial Management of accounts receivables and payables
- Integration of various systems with Business Central for a seamless data flow and collaboration across different departments
- Compatibility with Microsoft Excel to leverage the power of Excel for data analysis and reporting

WHAT OUR CLIENT SAY

“We have been working with **Dogma** since March 2022, and they have developed a system for us that combines our Accounts and CRM, replacing Sage. We have two businesses using systems that were very old and required huge amounts of manual work because the systems didn't speak to each other. The team at **Dogma** implemented a Microsoft Business Central for accounts and linked this with Dynamics CRM. This began with a full audit of our system before transferring it to the new system. **Dogma** also developed workflows that allowed us to generate invoicing with our CRM system, which directly feeds into our accounts, and tracks expenditure based on serial numbers.”

“During the development stage, we worked extremely closely with the **Dogma team**, and despite only communicating via video, we got to know them very well, and it didn't take long for them to completely understand us and our system. We now use them to provide continuing support and are looking to improve our processes with further development. I would not hesitate to recommend them.”

– **Tim Pile**, Operations Director



Transformations with Trust

We are committed to acting responsibly by integrating sustainability into every step of the business, including clients, partners' solutions, and the entire supply chain.



SUSTAINABLE DEVELOPMENT GOALS

Ready to embark on your digital transformation journey?



Let's Talk

