

**Relocation Leader Upgrades  
Microsoft Dynamics GP for a  
Significant Return on Investment**

**Case Study**

## Challenge

Founded in 1965, NuCompass Mobility provides a full menu of U.S. domestic and global mobility services to corporate clients worldwide. Ranked as one of the top relocation providers, NuCompass is focused on delivering better, faster, and less costly ways to provide employee relocation services. NuCompass utilizes technological innovation – including its own technology platform – to improve customer services and reduce costs.

To help the company streamline the tracking and reporting of relocation expenses, as well as optimize standard accounting procedures, NuCompass uses Microsoft Dynamics GP. The software, with customizations specific to NuCompass relocation processes, manages all the funds and expenses for transferring employees that occur during the relocation process. At the same time, Dynamics GP is used by NuCompass for payroll, financial management, business intelligence and reporting, and more.

NuCompass wished to upgrade its Microsoft Dynamics GP system from version 9 to the latest version to improve current business processes and take advantage of new application capabilities. Upgrading would enable NuCompass to integrate and automate manual processes and data transfer from its proprietary back office relocation system to the Dynamics GP software. The upgrade would also allow NuCompass to integrate its Dynamics GP software with its outsourced payroll services from ADP.

While the benefits of upgrading were clear, how NuCompass would accomplish the upgrade was not. After a disastrous upgrade to Dynamics GP version 9 performed by the same company that developed the customization for its relocation capabilities, NuCompass fired the vendor and began searching for a partner with the expertise and proven methodologies to successfully migrate NuCompass to the latest Dynamics GP version.

## Solution

NuCompass turned to Armanino for its proven Microsoft Dynamics practice, business process and technology expertise, upgrade methodology, and training. “Right from the start, Armanino was organized and methodical,” said Elise Riordan, vice president of strategic solutions at NuCompass. “It was obvious that the Armanino approach would enable us to be successful in meeting our business objectives.”

Before the actual upgrade, Armanino collaborated with NuCompass stakeholders, including the finance and IT groups, to discuss their requirements and ensure their expectations were met. With the planning and analysis complete, Armanino then upgraded Dynamics GP, the custom code for NuCompass’ relocation capabilities, and two third-party

### Customer Profile

NuCompass provides a full range of U.S. and global mobility services to corporate clients around the world. An upgrade from Microsoft Dynamics GP version 9 to Dynamics GP 2013 enabled NuCompass to integrate data transfer from other systems to eliminate manual efforts and 1.5 FTEs in the accounting department.

### Software & Services

- Microsoft Dynamics GP
- Armanino consulting and training services

### Benefits

- Eliminated manual effort with automated data transfer to other systems of record
- Reduced headcount in the accounting department by 1.5 FTEs

products. End-user testing and quality assurance were performed before the “go-live” of the new system.

Using a train-the-trainer model, Armanino provided end user training on the new navigation and application features of the upgraded Dynamics GP modules to two lead accountants, who, in turn, trained the other accounting staff. Additional training delivered by Armanino included instruction for Dynamics GP administrators, users of Management Reporter, and IT administrators.

*“This was one of the smoothest transitions I’ve ever experienced. With Armanino, there were no fire drills, no unexpected issues, and no end users calling me on the morning after the cutover.”*

**-Elise Riordan**  
Vice President of  
Strategic Solutions  
NuCompass

## Results

The upgrade to the latest version of Dynamics GP was the smoothest NuCompass had ever experienced, and users adapted quickly to the new capabilities thanks to the training from Armanino. “I’ve been through many upgrades before and moved our data center twice. This was one of the smoothest transitions I’ve ever experienced,” said Riordan. “With Armanino, there were no fire drills, no unexpected issues, and no end users calling me on the morning after the cutover.”

The upgrade enabled NuCompass to meet the important business goal of taking advantage of functionality for easily integrating data from other systems into Dynamics GP. Armanino is assisting NuCompass with importing its relocation data into Dynamics GP to eliminate manual data entry. Automating data transfer to other systems such as the back-office relocation system will result in a staffing-cost savings of approximately 1.5 FTEs (full-time employees), giving NuCompass a significant return on investment for the upgrade project.

“With the upgrade successfully completed, we can now move forward on other pending projects that promise to bring further business process improvements,” said Riordan. “We’re looking forward to a long, fruitful partnership with Armanino and continued return on our investment for the upgrade.”

## For More Information

For more information about Armanino products and services, call (925) 790-2600 or visit the Web site at [armaninollp.com/microsoft-dynamics](http://armaninollp.com/microsoft-dynamics)

## About Armanino<sup>LLP</sup>

Armanino<sup>LLP</sup> ([www.armaninollp.com](http://www.armaninollp.com)) is the largest independent accounting and business consulting firm in California and the 29th largest firm in the U.S. Armanino provides an integrated set of audit, tax, consulting, and technology solutions to companies in the U.S. and globally. The firm helps clients adapt and change in every stage of business from start-up through rapid growth to the sale of a company. Armanino emphasizes smart technology, leading a cloud revolution of financial, operational, sales and compliance tools that are transforming the way companies do business. Armanino extends its global services to more than 100 countries through its membership in Moore Stephens International Limited—one of the world's major accounting and consulting membership organizations. In addition to its core consulting and accounting practices, Armanino operates two other divisions—AMF Media Group ([www.amfmediagroup.com](http://www.amfmediagroup.com)) and Intersect Capital ([www.intersectcapital.com](http://www.intersectcapital.com)).