

# Traditional Medicinals Frees Its IT Staff to Focus on Partnering With the Business

CASE STUDY



armanino

## At A Glance

### Customer Profile:

Traditional Medicinals, a Certified B Corporation and California Certified Green Business, is the leading seller of wellness tea in the U.S. and the pioneer of the wellness tea category in the U.S. and Canada. Founded in 1974, the company needed a robust ERP and business intelligence system to support its continued growth. It turned to Armanino to implement Microsoft Dynamics ERP and Microsoft Power BI and then to manage both systems through a shared resources model.

### Software & Services

- Microsoft Dynamics ERP
- Microsoft Power BI
- Armanino managed services

### Benefits

- Avoided the time, cost and effort of recruiting and hiring three software specialists to manage and maintain the new core systems
- Freed up internal IT staff to focus on helping the business maximize the benefits of its new systems
- Gained access to high-level, functional and technical resources

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**-Scott Kenney  
IT Director Business  
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## Challenge

Demand for organic, ethically certified herbs is greater than ever, exemplified by the millions of consumers who drink Traditional Medicinals wellness tea to improve their health. The number one medicinal, organic, and Fair Trade herbal tea company in the U.S., Traditional Medicinals has upheld a high standard of ethical responsibility since its inception in 1974.

Honoring its triple bottom line of people, planet and profit means that Traditional Medicinals' supply chain — stretching across 107 different herbs from 37 different countries and six continents — is more complex than most in almost every way. Understanding and anticipating any and all factors that can impact supply, from climate change to human rights issues in communities, is essential to the sustainable growth of the business.

That's one of the driving reasons the IT team chose to replace its aging enterprise resource planning (ERP) system with a powerful new platform, Microsoft Dynamics ERP. Soon after it modernized its ERP, the company introduced a new data warehouse and business intelligence (BI) solution based on Microsoft Power BI to bring together internal and external data for sophisticated analysis and reporting.

To enable his IT team to dedicate its time to helping the business turn its newfound access to data into sustainable growth and profit, Scott Kenney, IT director for business systems and project management at Traditional Medicinals, decided to take a different approach to supporting the new core systems.

“When Armanino suggested managed services to maintain and enhance our ERP and BI systems, I knew it would allow my team to stay focused on our goal, partnering with the business to support our growth and achieve our purpose of benefitting all stakeholders.”

## Solution

Armanino LLP was the trusted partner Kenney and his team turned to for assistance with implementing Microsoft Dynamics and Power BI. One of the 25 largest independent accounting and consulting firms in the U.S., Armanino is also an Inner Circle and Gold Certified Microsoft Dynamics Partner, with deep expertise in Microsoft's Business Applications platform.

“After the successful go-live of our new systems, it made complete sense to continue our engagement with Armanino,” says Kenney. “The firm's managed services offering would mean that we could use our IT team's resources to deliver the highest value to the business while Armanino handled the day-to-day coding of enhancements and software maintenance.”

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The Armanino team worked to make the shift from implementation to managed services seamless for Traditional Medicinals. “Armanino made the transition easy for us,” says Kenney. “It was so seamless because the managed services team could learn firsthand from the consultants who worked on the implementation not only how our system is set up, but why it’s set up the way it is.”

With Armanino managed services, Traditional Medicinals now has access to a team of high-level, functional and technical resources, with the most current certifications and training, working on their behalf to manage their Dynamics and Power BI environments.

## Results

By relying on Armanino, Kenney avoided the need to recruit and hire new internal staff with the skills necessary to support the Microsoft systems. “If we had done this on our own, we would have had to interview and hire three people,” says Kenney. “The shared resource model from Armanino not only saves us money, it gives us access to a far richer set of resources than we could possibly have hired.”

The managed services approach frees up the IT staff to focus on improving processes and partnering with the business. “Instead of spending our time learning and maintaining the software, we can help our users take advantage of all the capabilities the software provides,” says Kenney. “For instance, with the new Microsoft systems, we can visualize our data for the first time. Because of Armanino, we’re able to spend our time helping the business do things like discover new ways to look at our supply chain or analyze parts of our operations to better control costs.”

At the same time, Traditional Medicinals benefits from the Armanino team’s in-depth knowledge and experience working with the business for the past several years. In fact, Kenney’s team views Armanino consultants as part of the extended IT team.

“Everyone we work with at Armanino knows what we’re doing and where we’re going,” says Kenney. “That insider knowledge, combined with their best practices and industry experience, means that we get valuable input and advice from our Armanino team on a range of topics.”

## Next Steps

In addition to delivering day-to-day managed services support, Armanino also provides Kenney and his staff with access to advice and information at a more strategic level, which he uses to inform his planning efforts.

For instance, Kenney and his team are planning the next phase of modernizing the company’s technology stack. First on the list is to move to Microsoft Office 365 for cloud-based productivity tools. The team is

also working to implement new cybersecurity measures and enhance the company's business continuity capabilities.

"While my team is executing against plans that have a shorter horizon, Armanino helps me figure out where we should be focused in the medium and long term," says Kenney. "It's a true partnership, and that's a nice feeling."

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

ArmaninoLLP ([armaninoLLP.com](http://armaninoLLP.com)) provides an integrated set of accounting services—audit, tax, consulting and technology solutions—to a wide range of organizations operating both in the US and globally. You can count on Armanino to think strategically, to provide the sound insights that lead to positive action. We address not just your compliance issues, but your underlying business challenges, as well—assessing opportunities, weighing risks, and exploring the practical implications of both your short- and long-term decisions. When you work with us, we give you options that are fully aligned with your business strategy. If you need to do more with less, we will implement the technology to automate your business processes. If it's financial, we can show you proven benchmarks and best practices that can add value companywide. If the issue is operational, we'll consult with your people about workflow efficiencies. If it's compliance, we'll ensure you meet the requirements and proactively plan to take full advantage of the changes at hand. At every stage in your company's lifecycle, Armanino can help you find the right balance of people, processes and technology.