



## Client Success Story

# Carillon Assisted Living Moves from QuickBooks to Microsoft Dynamics GP

### Company Profile

**Client:**

Carillon Assisted Living

**Industry:**

Healthcare

**Profile:**

Carillon Assisted Living manages and operates assisted living communities in NC, currently serving ~750 seniors

**Web Site:**

[carillonassistedliving.com](http://carillonassistedliving.com)

**Size:**

650 employees

**Years in Business:**

Established in 1996

**Corporate HQ:**

Raleigh, NC

**Locations:**

10 assisted living communities in NC

**Microsoft Dynamics GP Solution:**

Business Essentials Edition for five users

**The Challenge**

Carillon Assisted Living is experiencing vigorous growth in North Carolina's burgeoning elder care industry. With three new facilities opening in 2009, the privately owned company's long-term plans include adding 20 more communities during the next decade.

With its previous business management software, QuickBooks, Carillon had to produce separate profit and loss statements, cash flow statements, and balance sheets for each location. QuickBooks also presented problems with data security, accuracy and integrity, as well as substantial limitations in reporting and data interface with other software products.

With QuickBooks, data is entered manually in Excel workbooks that are not integrated with the QuickBooks general ledger. When Carillon had to change data or correct an error in Excel, it also had to go back and change the QuickBooks general ledger. It took Carillon a day and a half to print all the reports it needed every month.

"If we were going to grow," explains Carillon's CFO Kevin Johnson, "that growth needed to include an investment in a financial and reporting software package that had inherent internal control systems, the ability to generate more sophisticated and meaningful reports, and to be an overall efficient tool in driving the future growth of the business."

Carillon's financial management system needed to introduce expediency and provide more internal control of secure and accurate data and detail-rich reporting features. It also needed to seamlessly interface with other software such as payroll, order processing, and receivables.

**The Solution**

Carillon Assisted Living thoroughly evaluated four different business management systems. They selected Microsoft Dynamics GP, a complete and scalable business management solution with robust financial and operational functionality. Carillon licensed the Business Essentials Edition that includes over 20 modules in Financial Management, Supply Chain Management, and Business Intelligence and Reporting.

Originally, Carillon purchased Microsoft Dynamics GP from Microsoft Gold Certified Partner InterDyn-Artis in Charlotte, NC. Carillon then switched to Business Ready Solutions as its Microsoft Partner because of their close proximity to Carillon's headquarters. Business Ready Solutions implemented Carillon's system for five users in Carillon's corporate accounting department.

Implementation was a smooth process, says Johnson, and Business Ready Solutions helped Carillon tailor how they wanted their system set up. There were no big work stoppages or stumbling blocks, and the system was implemented on time. "Business Ready Solutions did a great job shepherding us through the process," says Johnson. "The information going into Microsoft Dynamics GP was accurate and in the format we wanted. Business

*“Our main goal for our business management system is that it serves us well operationally, and that the reports and information it produces help direct decisions in the field. Microsoft Dynamics GP accomplishes this for us. We use it to help drive the business, and take the information it provides and look at it as many different ways as possible in order to make sound business decisions and see our results through the numbers.”*

**Kevin Johnson, CFO**  
**Carillon Assisted Living**

### **About Business Ready Solutions**

Business Ready Solutions, LLC is a consulting practice that provides Microsoft Dynamics GP software implementation and support along with business process and accounting consulting for small and mid-sized businesses.

As a Microsoft Gold Certified Partner, we are more than just a software vendor. Our team of outstanding accountants, CPAs, Microsoft Certified Professionals and consultants is a broad-based resource with deep expertise to improve your business process and maximize your technology investment.



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Ready Solutions didn't simply tell us what to do. They suggested, 'based on our experience, you might want to try this instead.' They executed the process so the final product was just how we wanted it. They helped us get where we wanted to be."

Following implementation, Business Ready Solutions provided post-implementation support for Carillon's end users through the first 90 days after the implementation date. A closing meeting took place to determine required levels of service needed for Carillon to optimize Microsoft Dynamics GP and business process.

"Because of their background as accountants," explains Johnson, "Business Ready Solutions did a very nice job explaining how Microsoft Dynamics GP operates in relation to an accounting department's day to day responsibilities. As accountants, Business Ready Solutions understood our end product and what we were trying to achieve. They spoke our language, and therefore the implementation was more than just a mechanical exercise."

### **The Results**

Carillon Assisted Living has gained tremendous benefits as a result of switching from QuickBooks to Microsoft Dynamics GP. Johnson sites three main advantages for Carillon:

- Faster business close time to get financials out the door. They do not need to grow their staff as much because Microsoft Dynamics GP enables their employees to be more productive and allows for future decentralization of accounting and processing duties
- Greater efficiency in processing reports
- Better internal controls because of an integrated system that gives them more confidence and security in their numbers

Microsoft Dynamics GP gives Carillon the ability to decentralize some of its accounting and processing functions to the facilities, thus limiting future overhead growth at the corporate office. Carillon also has better insight into its business because Microsoft Dynamics GP generates more timely and accurate information and enables them to drill down and understand detailed transactions more clearly. Johnson says Microsoft Dynamics GP is user friendly and will support their growth.

By using Microsoft FRx, a financial reporting and analysis application that comes with the Dynamics GP Business Essentials Edition, Carillon also shaved two-three days each month off their report writing. "That is an incredible efficiency," claims Johnson. "I estimate Microsoft Dynamics GP saves us a blended salary rate of \$60K per year and five days a month in time."

Carillon is happy with its partnership with Business Ready Solutions. "Business Ready Solutions is knowledgeable and they know what they are doing," confirms Johnson. "We are confident they know their product and that makes everything easier. Their team is very responsive and they are great people to work with who don't get flustered. Business Ready Solutions gives us outstanding customer service."