

From Bottlenecks to Breakthroughs:

Caltech Group's ERP Overhaul with Microsoft Dynamics 365 Business Central

Key Highlights

1%

variance from budget and timeline—a remarkably low deviation for a project of this scale.

24 Hours

of strategic planning and requirement gathering workshops.

50+

users pilot, ensuring seamless integration and user adoption.



Industry: Geomatics Services



Long View consistently answered every question and made time for us whenever we needed assistance. They weren't afraid to walk us through complex processes, dedicating the time necessary to ensure we understood everything. Their quality advice and effective problem-solving skills made a significant difference in our project's success."

- Zachary Pengelly, Director of Finance, Caltech Group





Introducing Caltech Geomatics

With over 30 years of industry expertise, Caltech is a distinguished leader in geomatics services throughout Western Canada. The company's diverse team—comprising professional surveyors, engineers, geospatial experts, CAD and geomatics technicians, and GIS specialists—is committed to achieving client project goals through meticulous attention to detail and a deep understanding of complex regulatory, legislative, and technical landscapes.

Despite its prowess in geomatics, Caltech encountered significant operational challenges due to an outdated Dynamics NAV system, which posed severe security risks and led to inefficiencies that hindered their capacity to deliver the exceptional service they are known for. Recognizing the critical need for a robust, modern ERP system to streamline operations and enhance security, Caltech formed a strategic partnership with Long View. This collaboration led to the implementation of Microsoft Dynamics 365 Business Central.

Caltech



Battling Legacy System Challenges

The legacy system at Caltech had become a major bottleneck, impeding not only day-to-day operations but also the institution's ability to manage data and processes securely. In response to these urgent requirements, Caltech assessed multiple ERP systems, including NetSuite and Acumatica. Ultimately, Microsoft Dynamics 365 Business Central emerged as the top choice due to its seamless integration capabilities with their current Microsoft applications. They selected Long View as their Microsoft Partner for their customized approach and comprehensive understanding of Caltech's evolving requirements.

The Catalyst to a Trustworthy Partnership & Implementation

Caltech considered proposals from multiple service providers, including their current one, Open Door Tech, and a new contender NetSmart. Caltech chose Long View over other competitors due to their recommendation of a full system implementation rather than a simple migration, offering a solution that was more cost-effective and aligned with Caltech's evolving needs.

This strategic decision was supported by extensive preliminary evaluations, including over 800 questions and 24 hours of strategic requirement gathering and planning workshops, which were crucial in developing a deep understanding of Caltech's specific requirements.



Revamping Caltech's ERP System

Long View managed this entire project through a hybrid agile approach, balancing structured phases with the agility needed to adapt to unforeseen challenges. This methodological flexibility was pivotal, allowing the project to be completed within just 1% deviation of the budget and timeline constraints—a testament to Long View's precise and effective project management.

“***Our approach to the Microsoft Dynamics 365 Business Central implementation involved a deep dive into every aspect of the client's business. We focused on suggesting necessary process changes to enhance their operations. This allowed us to tailor the solution specifically to their needs, ensuring that the implementation was not just a technical upgrade, but a comprehensive transformation that would drive efficiency and effectiveness across their organization.***”

- Mala Mishra, Solution Architect-Data & Dynamics, Long View Systems

By addressing Caltech's requirements at every stage, Long View effectively provided solutions for all of the organization's challenges:



Security and Operational Risks

The transition to Business Central significantly improved system controls, automating previously manual workflows and enhancing security protocols. The legacy system lacked proper security profiles, which left Caltech exposed to risks. Long View implemented advanced security measures, reducing manual efforts and enhancing compliance processes. As a result, Caltech's operations became more secure, enabling better risk management.



Complex Integration Needs

One of the critical success factors of the project was integrating Caltech's existing tools, such as Aimsio—a heavily used field service management tool. Long View, led by Dynamics 365 Business Central Technical Consultant Deepika Charugundla, ensured the smooth API integration with Aimsio, which was one of the major risk areas identified early on. The seamless integration allowed Caltech to maintain continuity without disruption, dramatically increasing efficiency.



Customization for Enhanced Efficiency

The Microsoft Dynamics 365 Business Central implementation included specific customizations like EFT enablement and SharePoint Connector integration. These enhancements improved document management by linking to Caltech's corporate storage, enabling better control over documentation and reducing errors in financial reporting.



The system enhancements have not only improved our controls but also standardized documentation, reducing errors and increasing trust in our financial reports.

- Zachary Pengelly, Director of Finance, Caltech Group



The Critical Role of Open Communication

Exemplary communication between Caltech and Long View was central to the project's success. Regular updates and transparent discussions about project challenges ensured that the strategic objectives were continuously met.



Effective communication was a cornerstone of our success during the Microsoft Dynamics 365 Business Central implementation. Throughout the project, we ensured that all stakeholders were kept informed and engaged. Regular updates, clear reporting, and open lines of communication helped us build trust and foster collaboration."

- Leo Flores, Project Manager, Long View Systems

Pengelly praised this aspect, saying, "Long View's primary strength was their unwavering commitment to our comfort and satisfaction. They were responsive, attentive, and thorough at every stage, ensuring a successful project outcome that exceeded our expectations."

Charting the Future with Anticipated Results

Caltech has already realized early operational wins, such as improved visibility and controls in their purchasing processes. The new purchase order module allows key decision-makers to gain advanced insight into spending, reducing unnecessary expenditures and streamlining approval workflows.

Looking forward, Caltech plans to further leverage the scalability of Microsoft Dynamics 365 Business Central to incorporate advanced features like AI and improved data analytics with Power BI integration, supporting strategic decisions.

Pengelly shared his vision for the future, "Our plans with Microsoft Dynamics 365 Business Central are focused on leveraging its scalability to incorporate more advanced features like AI and improved data analytics to support strategic decisions."



Efficient Operations and Strategic Growth

The strategic foresight, meticulous execution by Long View, and the robust partnership with Caltech ensured not only a successful transition to a modern ERP system but also positioned Caltech for future growth and innovation. This case study not only highlights the transformative outcomes but also sets a benchmark for similar future projects in the geomatics sector, illustrating how strategic planning, dedicated execution, combined with effective communication, can lead to the successful completion of complex projects within remarkably precise constraints.



About Long View Systems

Long View Systems is a prominent IT company in North America, focused on providing cutting-edge solutions in Cloud, Security, End-User Experience, Collaboration, Procurement & Licensing, and Applications.

Boasting more than 25 years of expertise and a presence throughout North America, Long View prioritizes people and supports digital transformation for businesses of all scales. Recognized as Microsoft Partner of the Year three times, Long View consistently raises industry benchmarks through its people-centric strategy and strong partnerships with top technology firms, enabling clients to move their businesses forward.

Move Your People and Business Forward.

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