

CASE STUDY FLORIDA MUNICIPAL POWER AGENCY Energy - Power

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Mike McCleary, Manager of Member Services Development



Florida Municipal Power Agency (FMPA) is a wholesale electricity provider to 31 city-owned power companies in Florida. FMPA’s mission is to provide low-cost, reliable and clean power, plus value-added services for their owner-customers that benefit their communities and customers. FMPA’s member utilities are located throughout Florida from the Panhandle to Key West. These utilities are individually owned and operated by the cities they serve. By working together with FMPA, the cities can enhance their operations and offer affordable, reliable service to their customers.

Over the last few years, FMPA has significantly expanded the value-added services it provides to members, which has led to service projects growing exponentially. This growth created an exciting challenge for FMPA to help its members in new ways.

FMPA is a collaborative organization with team members from various departments involved in projects. The service expansion meant many employees were performing additional work, on top of their day-to-day responsibilities.

Key Benefits

- > Improved documentation and tracking of cases and activities
- > Improved efficiency of delivering service projects
- > Provide information for decision making around service delivery and managing human resources
- > Provide accessible, on-demand access to records of activities and cases
- > Provide integration with existing Outlook and Office software
- > Provide a useful mobile option
- > Provide dashboards to help manage cases and resources
- > Enhanced accessibility of account contact information across the FMPA team

As the services expanded, FMPA needed a more efficient way to track projects. Team members had project records saved in varied locations, and they were individually tracking their own cases, contacts, activities and tasks.

FMPA's team was concerned that this dispersed system was too dependent on each team member and that there was not enough transparency into projects. People were worried that things might fall through the cracks and knew the growth was making it necessary to consider new processes and tools.

The Right Solution

In order to determine if a CRM system would be the right solution for FMPA, they created a cross-functional team of potential CRM users. As a group, they learned about CRM capabilities, explored use cases and prioritized system requirements.

During this foundational phase, Alithya helped to educate the FMPA team and stayed engaged throughout the process. "The Alithya team was patient with us as we completed the project scoping and procurement phases. These steps probably took us a year, but Alithya was helpful and understanding," said Mark McCain, Vice President of Member Services and Public Relations.

As a public agency, FMPA must follow a competitive procurement process. After deciding to pursue the purchase of a CRM, they had to determine if and how to fund the project. Alithya was able to submit a proposal that met FMPA's needs in a cost-effective way, helping them to make the decision to move forward.

Mike McCleary, FMPA's Project Manager for CRM, said, "Microsoft D365 with Alithya's implementation was the best overall value for our needs. It gives us the functionality we need at a competitive price with excellent integration to our other Microsoft applications."

Key Business Outcomes

While many CRM applications are driven by sales, FMPA's is driven by service to its members.

As a result, their key business outcomes are focused on helping their team deliver value-added services to FMPA's owners.

One important outcome they seek is improved documentation of cases through projects and interactions. As a collaborative organization, it is critical for FMPA to provide visibility and on-demand access into ongoing projects across the Agency.

Another outcome FMPA needs is enhanced efficiency. As their team has received additional responsibilities, they need a tool to enhance their efficiency, helping them to feel confident that they are effectively managing their projects and activities.

Lastly, they need a tool for their leadership team to help in the management of workload, resources, and service delivery.

Tangible Improvements

While FMPA is still early in its implementation, they have already seen positive outcomes and Dynamics 365 has received great reviews. They have successfully passed the go-live phase, and now they are focused on the adoption phase.

"We put notable effort into creating a robust contact database," said McCleary. "This has been an early win that is valued by our users. Also, Dynamics 365 integrates well with Microsoft Outlook and has a consistent user experience in mobile applications. Our users appreciate this capability. Another standout feature early on, is the ability to easily sort cases by account and track project activities. Everyone sees the power of this functionality."

McCain said, "The dashboards available in Dynamics 365 have already made it infinitely easier to view and sort data that is critical for management decision making."

Partnership with a Trusted Advisor

According to McCain, "Alithya has been an excellent implementation partner. We appreciate their expert support developing and deploying D365. We relied on them to provide implementation best practices, and the process went smooth."

"Alithya brought a structured and proven approach to CRM deployment," he added. "They gave us good advice on the project team roles and time commitments that we should expect. Also, they laid out each step of the deployment process, and our project went according to plan. We appreciate their early emphasis on business outcomes to focus the project and their early emphasis on a training plan that made user training a priority, not an afterthought."

By trusting in Alithya's Customer Owned Rapid Engagement (CORE) strategy coupled with their training program, FMPA ensured its CRM implementation was successful from the start. Not only was the implementation a success, but it also was completed on time and on budget.

Per McCleary, "The schedule couldn't have been any better. We established a nine-week implementation plan from Design Start to Go Live, and we hit every milestone on the way to CRM launch."

McCain added, "Alithya has a professional team that cares about its clients and their implementation success. Industry statistic on CRM failure rates can be sobering. From the start, Alithya made it clear that this is not just a software installation. They want to implement a system that delivers on business outcomes, is accepted by users and produces a return on investment."

"We worked closely with our Alithya engagement manager and solution architect during the project. It was such a team effort that we invited them to our celebration for the successful project launch. Alithya's team is part of our team, and they continue to support us in the adoption phase."

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– Mark McCain, Vice President of Member Services and Public Relations

Alithya is a leading strategy and digital technology company with over 2,000 highly skilled professionals delivering solutions across Canada, the US and Europe. Alithya's Microsoft practice covers a wide array of capabilities including Dynamics, Azure, business analytics, digital solutions, advanced analytics, application development and architecture. Focused on business outcomes, our combined companies have delivered Microsoft ERP, CRM, BI and digital solutions to over 1,200 clients. Alithya's global offering is to deliver strategy and digital technology services.