

**Challenge:**

Implement a new ERP/CRM system to provide better insight into the manufacturing plan, on hand inventory, and efficient order fulfillment.

**Enabling Technology:**

Microsoft Dynamics NAV, 30 users  
Microsoft SQL Server 2005  
Windows Server 2003  
Microsoft Office Integration System  
Lanham EDI and eShip

**Results:**

- Reduced Shipping Costs by \$100,000 annually
- YOY growth of 12 to 23%
- Increased efficiency and reporting
- Enhanced net inventory management
- Improved customer communication and reduced customer service calls

**Background:**

Saris Cycling Group designs and manufactures products for the bicycling industry. Founded in 1973 with the invention of its first bike rack, the company has evolved to include performance training products and has become a respected world-wide brand, trusted by bicycling enthusiasts.

After years of steady growth, Saris found itself unable to easily retrieve accurate and timely data for sales, inventory, production analysis, and financial reporting. The inability to do efficient manufacturing planning drove up net inventory over multiple locations, and their current system lacked the flexibility to adjust its planning fence as needed. In addition, data was entered, reported, and accessed multiple different ways throughout all parts of the business. Initially, Saris considered adding a CRM system into its current ERP but after considering the long-term viability and cost, it was clear that a replacement ERP/CRM system was needed.



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Saris set out to find an integrated system to increase efficiency, reduce costs and integrate the following:

1. Shipping: Integrate an electronic shipping system to reduce costs, redundant entry, find the best pricing, and accurately calculate proper freight charges.
2. Production Schedule with Inventory Integration: Provide the ability to respond to daily/hourly changes on demand, identify priorities quickly, and shift labor where needed.
3. EDI: Reduce double entry and improve order turnaround time.
4. Inventory Management: Successfully manage net inventory over multiple stock locations.

Saris selected Microsoft Dynamics NAV based upon its strength in manufacturing. Then, they set out to find the right partner. "We wanted a partner who had done it before and had staff to not only perform the install but support us long term," said Kevin Fons, Materials Manager. "The understanding of NAV needed to be matched with understanding our business."

In March 2014, under extreme pressure and short timelines, Saris hired another company to install the system after Innovia was honest about its ability to take on another project at the time. By July 2014, the system was live. Saris quickly realized the provider did not dig deep enough into the business needs and didn't have the staff to effectively support what was required. The decision was made to hire Innovia to support their NAV system and fix the issues still lingering from the previous partner's process. "We chose Innovia based upon the honesty and experience of the staff, plus, where they were located. Right here in the Midwest," said Fons.

### **Racking up the Integrations**

With years of manufacturing experience to draw from, Innovia tackled the inventory management problem first. Saris often had extra inventory sitting at other locations, which could be used to supply demand instead of manufacturing new products. The collection of net inventory, not the inventory for a specific location, would reduce overall inventory while still managing demand, thus improving production schedules and adjusting its manufacturing planning fence instantly, based on labor and demand.

The ability to manage production and inventory was further enhanced through the use of an electronic data interchange (EDI) system. By integrating Lanham's EDI application into NAV, orders are brought directly into NAV and ASN's and invoices are sent out automatically at the time of shipment. This reduces order turn-around



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time, and eliminates order entry mistakes. The EDI application also improves shipping costs and tracks ship-to addresses for multiple bill-to customers without duplicate data entry. With Lanham's EDI and eShip integration, Saris can ship direct to FedEx and UPS and provide customers with tracking information, improving its overall shipping management.

Knowing that Saris could benefit from the enhanced reporting capabilities, Innovia furthered the NAV integration using Microsoft reporting tools within NAV and SQL Reporting Services. Now, Saris has accurate and timely access to sales, financial, inventory and production information throughout the organization. "Innovia has been a true partner in the process. They come to us with new features - add-ons that have made us more efficient and profitable. They know how to customize NAV and give us the best solution, the first time." said Fons.

### **Measureable Results**

Within 10 months of EDI deployment, Saris saw a positive ROI and is continuing to see significant business impact from the NAV integration. With increased labor efficiency, Saris has been able to grow year over year by 12 to 23%. "We've nearly doubled in sales volume since we implemented NAV and have only incrementally grown in head count," said Fons. "People are able to do much more in much less time and have access to information they need for real-time decision making."

Using eShip has resulted in tremendous labor savings in UPS/FedEx parcel shipping. Packages are shipped directly from inside Dynamics NAV, eliminating re-entering addresses and tracking numbers. Labor savings are estimated to be over 50% with an additional \$100,000 savings in shipping costs annually. Customer service has also improved by providing customers with tracking information and the bill-of-lading via email. This proactive approach has reduced the number of customer service calls Saris receives for ordering and shipping related inquiries. In addition, the SQL Reporting Services (SRS) produces reports specifically for each customer. The reports enable the automation of past paper processes by using SRS subscriptions. Through these subscriptions, errors and missed purchase orders have been reduced. Vendors are automatically sent reports each week, allowing them to verify orders and communicate inaccuracies. Fons adds, "The success is only further enhanced by working with Innovia. Innovia has been a true partner in the process. We would have never grown at this rate, this quickly, if it weren't for Innovia's knowledge of NAV. Innovia really has our back."



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### **About Saris Cycling Group:**

Saris Cycling Group designs and manufactures products for the bicycling industry. Founded in 1973 when they invented their first bike rack, the company has evolved to add performance training products. With a company of dedicated product managers, ingenious engineers, and hardworking employees, they are respected world-wide and have a brand that is trusted by bicycling enthusiasts. For more information, visit [www.sariscyclinggroup.com](http://www.sariscyclinggroup.com)

### **About Innovia Consulting:**

Innovia is a business consulting and IT services firm recognized for delivering exceptional client service and innovative ERP systems built on Microsoft Dynamics NAV. With 30 years in the business, four locations in the Midwest and hundreds of business software implementations, the company's ERP experts have helped customers in nearly every industry and of every size – from start-ups to Fortune 1000 enterprises. For more information, visit [www.innovia.com](http://www.innovia.com).



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