

CASE STUDY



Open ERP Expertise Guided a Leading Energy Management Company to Self-Sufficiency





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Thought leader Open Source Integrators (OSI) served exclusively as coach and teacher to an energy management company that provides scalable and affordable engineering solutions for multi-site enterprises. This company's managed services help sustain energy savings, and reduce service and labor costs.

According to company leaders, "The biggest challenge that we had to overcome was the switch from the European based accounting to the US based accounting. We were given some custom US modules to install that made the system work for our situation."

Open Source Integrators was the sought after and trusted expert that helped the company implement what they already knew they needed, with the help of OSI's world-class Open ERP teams and industry best practices.



Situation

The company already had an advanced understanding of their needs, the technology, and open source system they were going to use. They were reaching a point where they could manage it on their own, but required the thought leadership and industry insight from a top, independent open source integrator providing a unique combination of open source business process consulting and improvements in the engineering

industry. The company was strong in their accounting capabilities; they simply needed the assistance to pivot in the right direction utilizing the USA Odoo accounting system.

The company's goal was self-sufficiency in managing their system and processes.

Process

This process was unique as the project primarily involved coaching workshops customized by OSI to the company. Open Source Integrators always begins by getting to know the company, and their needs, goals and objectives. Because of OSI's priority on communication it's more than a business practice, it's a culture.

- + Open Source Integrators' engagement was primarily to provide the company with business process engineering and to provide expert opinions and advice on how things can be built using the system.
- + OSI set up two-hour teaching sessions to explain how the processes worked and how to fine tune. The entire project was a workshop to guide the company in doing it themselves.
- + The company had their own team of developers to build; Open Source Integrators were the experts in helping them make what they built better.
- + Most of the coaching was on the Open ERP process and development with USA Odoo.
- + OSI performed some key pieces in accounting and in sales, but most of the work was done by their team.
- + True collaboration took place where as this company actually helped Open Source Integrators develop an innovative solution for them that resulted in the development a new module called Partner Aging that is now offered to every OSI client.
- + Rather than have one coaching workshop at the beginning, multiple coaching sessions took place throughout the project.



Solutions

Best-of-class, integrated Open ERP solutions included

+ Accounting:

Accounting-centric Open ERP software integration.

+ Business Process Management:

Business process optimization with Open ERP for improved results.

+ Customer Relationship Management:

Driving customer intimacy with Open ERP technology.

Results

The company CFO knew what he wanted and his team possessed a high level of capability, they just didn't know how to get there. With Open Source Integrators' involvement, the following were achieved:

- + The job was completed in two years, on schedule.
- + The company procured and implemented systems based on OSI's recommendation.
- + Freedom that resulted from achieving total self-sufficiency and enhanced, integrated capability.
- + The project is determined a success; they are still using it. Together, OSI and the client met their goal.

“The biggest benefit to working with Open Source Integrators was that we were able to have someone that was an expert on writing custom modules that we could go to if we had any questions,” company leaders noted. “They were also able to configure our system to the way we wanted it.”



The Open Source Integrators Difference

Open Source Integrators stands in a category of one.

Open Source Integrators provides decades of experience in Open ERP spanning a wide range of industries. From small, independent entrepreneurs with a big idea to national infrastructure efforts, you can rely on the scalable ERP expertise from Open Source Integrators around the clock.

As a top independent Open Source Integrator in the US, Open Source Integrators provides customers a unique combination of open source business process consulting and improvements in industries ranging from construction and utilities to manufacturing, engineering, the service sector and direct to consumer.



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