For more information about other Microsoft customer successes, please visit: [www.microsoft.com/casestudies](http://www.microsoft.com/casestudies)

**Customer:** Freelance World

**Web Site:** <www.freelanceworld.net>

**Number of Employees:** 60

**Country or Region:** United Kingdom

**Industry:** Professional services—Accounting services

**Partner:** Codify

Customer Profile

Freelance World provides accounting and taxation services to thousands of self-employed people in more than 30 countries. It helps its clients meet all their statutory responsibilities in any country.

Software and Services

* Microsoft Dynamics
* Microsoft Dynamics AX 2009
* Microsoft Dynamics CRM 4.0
* Microsoft Server Product Portfolio
* Windows Server 2008 Datacenter
* Microsoft SQL Server 2008
* Technologies
* Microsoft Silverlight
* Hyper-V

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|  |  | CEP_Masthead_Blue1 |
| Microsoft DynamicsCustomer Solution Case Study |
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|  | C:\Documents and Settings\andreaan\My Documents\My Pictures\FREELANCE_LOGO.JPG |  | Dynamics HeaderAccountancy Provider Transforms Customer Service with Business Management Solutions |
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“Microsoft Dynamics solutions are flexible, so we can customise the technology as often as Freelance World needs. By combining them with Silverlight…we can create highly innovative solutions quickly.”

Mark Griffiths, Managing Director, Codify

Inflexible systems at Freelance World hindered its ability to provide an efficient service. Microsoft® Gold Certified Partner Codify helped the accountancy provider deploy Microsoft Dynamics® AX 2009 and Microsoft Dynamics CRM 4.0 business management software, with interfaces built using Microsoft Silverlight™. Employees now spend less time processing invoices and focus on the proactive services that make Freelance World invaluable to its clients.

Business Needs

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A technology overhaul is underway at Freelance World to help it deliver the best possible service. Based in Scotland, the accountancy provider has around 1,500 self-employed clients, from IT contractors to oil and gas industry workers.

Freelance World aims to deliver reliable taxation and accountancy assistance to ensure its clients meet contractual and statutory obligations. To support this service, a recent infrastructure upgrade to the Windows Server® 2008 Datacenter operating system has paved the way for a new generation of business applications to replace its custom-built solutions.

With the supporting technology in place, Freelance World engaged Microsoft Gold Certified Partner Codify to help find the most appropriate systems to resolve the organisation’s inefficiency. Alasdair McGill, Managing Director, Freelance World, explains that the existing accounting system simply didn’t offer enough flexibility. “We had no proper accountancy solution—just a large database,” he says. “Employees had to export the data into spreadsheets and try to produce accounts from this. There were no data integrity checks within that software, and it cost the company a huge amount of money and a number of clients.”

Time-consuming tasks, such as generating timesheets and invoices, prevented employees from carrying out the kinds of activities that make the organisation’s services invaluable, such as keeping clients’ accounts up to date and proactively chasing their customers for payment.

The inflexibility of the technology led to a number of additional problems. In April 2007, the U.K. government introduced Managed Service Companies legislation. This affects the way Freelance World clients’ earnings are taxed. “We couldn’t easily adapt our service to make sure that our clients were all complying with this legislation,” says McGill. “This was one of many reasons we needed a solution with the flexibility to make changes quickly.”

Solution

McGill worked with the Codify product team and Microsoft to identify clients’ needs. Freelance World agreed that Microsoft Dynamics AX 2009 business management software was best placed to deliver a robust accounting solution. Mark Griffiths, Managing Director, Codify, explains: “What makes this project unusual is that the technology needs to manage around 1,000 separate companies. But Microsoft demonstrated that Microsoft Dynamics AX 2009 is working efficiently in other, similar scenarios, giving Freelance World confidence that it was the right choice.”

McGill also wanted to ensure that when clients call the company, employees have a full history of communication at their fingertips. Codify rolled out Microsoft Dynamics CRM 4.0 for advanced customer relationship management.

The products fit together seamlessly, providing a working environment so intuitive that employees are rarely aware of which solution they’re using. When Freelance World clients submit their monthly timesheets, the solution automatically allocates them to an available employee to ensure service deadlines are met. A Microsoft Dynamics CRM screen helps the employee create the invoice before automatically sending it as an e-mail attachment to the client’s employer. It also updates Microsoft Dynamics AX.

Microsoft Silverlight, a Web browser plug-in, creates an even richer user experience within the organisation’s business applications. Using Silverlight, Codify built an interface within Microsoft Dynamics CRM to accelerate process-oriented tasks, such as the creation of timesheets or invoices. Griffiths says: “If we’d used Microsoft Dynamics CRM customisations on their own, we’d have needed more screens to meet our objective. By using Silverlight, we were able to bring a lot more information onto one screen.”

In particular, Silverlight enhancements add real value to the processing screen. Here, images of stacked documents representing the number of items waiting in queues appear across the top of the page. “These queues include numbers of timesheets or invoices waiting to be created,” says Griffiths. “Because this element of the application is written in Silverlight, we can make it active, so it refreshes itself every few seconds. This provides users with a real-time view of how much activity is occurring on the processing floor.” A wizard-like feature, also written in Silverlight, guides users intuitively through the process of generating and checking invoices.

Benefits

Freelance World wanted to find a solution that would improve its offering and maximise its business efficiency. McGill explains that the flexibility of the solution and its ease-of-use are key factors in the improvements clients experience today. “We now deliver a consistent and efficient service without system failures,” he says. “Codify listened to us and delivered what we needed. We’re delighted with what we’ve achieved.”

* **Employees focus on customer needs.** Today, employees can devote more time to proactive services that are invaluable to clients, such as book keeping and tax advice, rather than creating invoices. “A year ago, we needed around 40 people to process timesheets and invoices,” says McGill. “Today, we only need six, which has ensured dramatic savings for us.”
* **Real-time information supports business decisions.** A clear view of data reduces the amount of effort previously spent cross checking different sources to generate basic reports. Daily statistics provide real-time business information, allowing Freelance World to maintain better control over operations. “This technology is designed to provide the information we need to have our fingers on the pulse of the business,” says McGill.
* **Flexible systems ensure clients meet regulatory requirements.** Freelance World can modify the system as needed to support new legislation and ensure clients comply with regulations. Griffiths says: “Microsoft Dynamics solutions are flexible, so we can customise the technology as often as Freelance World needs. By combining them with Silverlight—which is so intuitive, it potentially shaves off a third traditional development times—we can create highly innovative solutions quickly.”
* **Automation and reporting generate significant time savings.** Freelance World once delayed its own business accounting process until the end of the financial year. The solution, however, prompts monthly reconciliation for every client. By year-end, the business expects accounts to be up to date, saving a team of people from months of work reconciling and querying historic transactions.