

Garrison Dental and
Exact MAX

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Now that we've
flipped the switch
and gone live
with Exact MAX,
it's going great.
We really like the
software."

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A QUICK IMPLEMENTATION KEEPS GARRISON DENTAL ON THE FAST TRACK



Dr. Edgar and Dr. John Garrison started Garrison Dental in 1996 in the basement of the building that housed their dental practice. Since that time, the company has grown. Its innovative Composit-Tight Sectional Matrix System is the number one product of its kind in the world, and it's in use in dental practices on every continent including Antarctica.

Garrison Dental remains a tight-knit business. Tom Garrison, Dr. John Garrison and close family friend, Rob Anderson, run the company, which credits its success to its laser-like focus on innovation and continuous improvement.

Business Needs

Garrison Dental had outgrown the capabilities of its homegrown ERP system. While they used Microsoft Dynamics CRM for order entry and Intuit QuickBooks for accounting, the rest of the system could no longer support their growth and business process innovation. The company decided to seek out a new ERP system to sustain their competitive edge and prepare for continued growth.

The company formed a search committee to select the new ERP system and to oversee its implementation. The first step was to hire a consultant to help them define their requirements, including identifying the "nice to have" features that would make the new ERP system a standout over just meeting the "must have" needs.

The selection team narrowed the choices to three different ERP systems, including Exact MAX. Tom James, Garrison Dental's Materials Manager and member of the company's ERP selection team, had previously used Exact MAX at a company he owned, and he knew it to be a great solution to support a small or mid-sized manufacturing business. In late June of 2014, at the end of its search, Garrison Dental selected Exact MAX as their new ERP solution. Based on a number of factors, including the company's transaction volume, the number of people involved in the implementation project and guidance from Exact MAX's consulting team, Garrison set an ambitious but reachable "go-live" date for mid-December, 2014 – less than six months away.

Business Solutions

Garrison Dental wisely worked with a team of consultants from Exact MAX. The team advised them on the best way to implement Exact MAX to meet their needs, and also helped to set up the implementation plan. A phased

implementation was recommended in Garrison's case to first help the company quickly improve on their shipping processes, which were critical to the success of the business. A phased implementation approach is commonly chosen by Exact MAX customers who are looking to rapidly take advantage of functionality that will significantly impact their efficiency, service level, and costs—or because of a limited number of resources that make it difficult to complete a project all in one time frame.

Once the software was installed, Garrison Dental began the implementation on its own. They kept in close touch with their Exact MAX consulting team, and they even had a consultant come to their headquarters in Spring Lake, Michigan partway through to assess their progress.

One piece of invaluable advice from the consultant was to set up a sandbox environment to test their data and to familiarize users with the new business processes. The team from Garrison Dental followed the advice and continued their implementation in the sandbox.

The implementation team loaded all their data, including item master, bills of material, routings, suppliers and purchasing data. Using the complete data in the sandbox, Garrison's implementation team tested the system to make sure everything was loaded correctly and that they understood how it worked. They actually entered customer orders, shipped orders, moved inventory and processed shop orders so they had a complete picture of the new system and procedures.

Balance Point Technologies, an Exact MAX partner, worked with Garrison to create a custom interface to their existing Microsoft Dynamics CRM solution. Balance Point also developed a custom shipping solution that Garrison called "Pick 'n Ship." Garrison Dental uses Pick 'n Ship to ensure rapid, accurate shipment of customer orders, which is one of its most important differentiating business processes.

Just before go live, Garrison Dental moved their live data into Exact MAX using MAX's ETL utility [Extract, Transform and Load] to simplify and streamline the data migration process.

Results/ROI

Garrison Dental went live with Exact MAX less than six months after signing the purchase order. The experienced team of consultants from Exact MAX and the pros at Balance Point helped Garrison Dental ensure that their Exact MAX implementation experience was smooth and efficient. Flexibility was the key to success; both the Exact MAX and Balance Point consulting teams were able to rapidly make changes to Garrison's custom applications when it was determined that original specifications could be improved upon. As Tom James says, "It wasn't even six months and we had the software up and running. Now that we've flipped the switch and gone live, it's going great."

Meeting the company's aggressive timeline was key to kicking off their tenure as Exact MAX users on the right note, but the benefits of choosing Exact MAX didn't end with go live. The integration to Microsoft CRM has helped to speed up order cycle times. Garrison enters customer orders into Microsoft Dynamics CRM and the custom interface that Balance Point developed moves the orders into Exact MAX for shipment. Along with the order, the integration also creates the customer record in Exact MAX so that the team from Garrison doesn't have to contend with entering records in both systems or worry about mismatched or inaccurate data. Garrison is also able to use Exact MAX's multicurrency feature to accurately handle sales orders in Euros and other foreign currencies all the way from order entry through shipping and to Accounts Receivable.

Once they are ready to ship the orders, Balance Point's Pick 'n Ship utility allows Garrison to record the shipment of products with a single scan. This helps ensure accurate inventory records and invoices. Garrison uses Exact MAX's lot

tracking functionality to help with shipping transactions. All lots have bar codes to simplify transacting shipments, and the shipping team uses wireless handheld scanners to collect the data. Using Pick 'n Ship and Exact MAX's lot tracking module is as simple as checking out at the grocery store, and it saves time as well as improves accuracy. Customers appreciate the short order cycle and accurate shipments that set Garrison apart from its competition.

Efficiency improvements also extend to the shop floor, where Garrison Dental uses Exact MAX to create shop orders and backflush materials. While it was a whole new process and way of transacting for the production team to learn, the system is running efficiently. Tom James adds his seal of approval, "I feel confident that this is going to work very well for the company."

Next Steps

After taking a short breather between implementation phases, Garrison dental plans to begin phase two of their Exact MAX implementation in early 2015. Phase two includes the use of Exact Synergy for human resources and possibly Exact Event Manager for workflow and alerts.

They also plan to add Exact MAX Warranty Tracking and serialized lot tracking in the near future to round out the solution and further improve their effectiveness. Garrison will also start using more of the functionality in the modules they have already implemented to simplify and streamline their business processes even more.

About Garrison Dental

Like so many entrepreneurial businesses in America, Garrison Dental Solutions started out in a basement; the basement of Dr. Edgar and Dr. John Garrison's dental practice. That's where the original Composi-Tight Sectional Matrix system was brought to life back in 1996. Many years and several hundred million matrix bands later, that same energy and enthusiasm that got the ball rolling is still driving them forward. The company's



Garrison Dental

Tom James, Materials Manager

“ The implementation of Exact MAX went smoothly. When we purchased Exact MAX at the end of June we planned to implement the software by the middle of December, and we did it. It wasn't even six months and we had the software up and running, and we've been running our business on it ever since.”

flagship product line, the Composi-Tight Sectional Matrix System has grown to the number one product of its kind and is used on all seven continents around the world.

For more information about Garrison Dental Solutions, visit garrisdental.com.

About Exact MAX

With decades of experience serving entrepreneurs, Exact understands the issues that manufacturing companies face when running their business. Exact MAX helps growing manufacturers control their resources with an easy-to-use solution that reduces the cost of manufacturing, automates manufacturing compliance, and improves profitability all while enhancing customer service and satisfaction.

Through seamless integration with Microsoft Dynamics GP and Intuit QuickBooks, Exact MAX offers the power of integrated ERP and boasts a particularly strong footprint with manufacturers that must maintain compliance with government or industry regulations, manage recalls and control and document product revisions and engineering changes.

For more information about the products and services that Exact offers, please contact us at 1.855.392.2862 or visit us online at max.exactamerica.com.