



How Brightwater is building a single view of the customer with Epicor ERP 10

CASE STUDY



“Epicor ERP 10’s ability to access and display information that lives in other systems is a game changer. It gives us the ability to tie financial and client data together, respond quicker, and stay competitive.”



Bret Campbell,
CFO, Brightwater

Brightwater Care Group, Ltd.

For Brightwater, no one is beyond care. That's why the Australian not-for-profit is dedicated to supporting people of all ages to live a better quality of life.

HIGHLIGHTS

GOALS

- Streamlining customer relationship management
- Simplifying complex billing and financial processes
- Mitigating support risk

CHALLENGES

- A misalignment on project goals delayed implementation
- Brightwater and Precise re-pivoted and re-launched the project within 3 months

SOLUTION

- Epicor ERP 10 upgrade integrated with financial, CRM, and SLS systems
- Flexibility and technology to support a mobile workforce
- More automation for processes (email, invoicing, etc.)

RESULTS

- Epicor ERP 10 functions as a central client hub across all Brightwater services
- Better security of client information and data
- Improved financial controls and simplified reporting

Goals

MITIGATING RISK, SAVING TIME AND ELIMINATING INEFFICIENCIES

For Brightwater, being able to deliver timely care and support services to their clients is an uncompromisable part of who they are.

That's why it was so important to CFO Bret Campbell to find a flexible and user-friendly enterprise resource planning (ERP) software system. He wanted an intuitive way to manage client information, streamline billing and payments, and make crucial client information easily accessible for members across their organisation.

The search led him to Precise Business Solutions (Precise) and, initially, the Epicor ERP 7 with Senior Living Solution (SLS). They also adopted Epicor Advanced Requisition Management (ARM), the online requisition management and workflow companion solution for ERP, developed by Precise.

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“In Precise products, I could see a solution that would help us manage all of the complexity around client information and billing and funding in the aged care industry,” Bret explains.

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For years, these products helped Brightwater serve their clients. But Bret knew that maintaining the same financial and customer resource management (CRM) system for 15+ years carries risk. Bret needed to ensure that his products were up to date to ensure that they would continue being supported.

It was time to upgrade their system from Epicor ERP 7 to Epicor ERP 10.

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“We had all this client data, but we didn’t have a central source of information. Epicor ERP 10 gives us the platform to bring all of these threads together in one place.”



Challenges

ALIGNING ON THE GOALS OF THE ERP UPGRADE PROJECT

Implementing the ERP system upgrade wasn't without its challenges. As Bret explains:

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“We had an early misalignment which delayed implementation. Precise's project manager was understandably trying to coordinate an ERP project, whereas our team thought they were running a financial project.”

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Fortunately, once they identified the hiccup, both project managers were able to quickly align their strategic visions and refocus on the true goal of the upgrade.

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“When we realised that we were talking apples and oranges, we were able to re-pivot and agree that what matters here is the client,” Bret says.

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At this point, Brightwater's team already had a deep and intuitive understanding of what Epicor ERP 10 could do as a financial system, and how the upgrade would improve and simplify billing and payments.

With the misalignment identified, it only took three months for Brightwater's team to make a strategic shift and fully embrace the unique CRM capabilities of Epicor ERP 10 too.

Throughout the process, multiple members of Precise's team worked on-site at the Brightwater head office to get the upgrade up and running. As many as five people were on-site at the peak of the project, which facilitated communication and helped the upgrade stay on-target.

Bret says if he had to make the choice a second time, he would partner with Precise again without any hesitation.



“We would definitely choose Precise again. Lots of projects have rough patches, but their team is dedicated to finding and fixing whatever needs to be fixed and the value we’ve created together is very positive.”

Solution

UNIFIED FINANCIAL, CRM, AND SLS SYSTEMS

With Epicor ERP 10 fully integrated, Brightwater benefitted from a number of immediate quality of life improvements.

The upgraded system integrated seamlessly with Brightwater’s existing systems, including their clinical and expense management systems. And, just like Epicor ERP 7, the Epicor ERP 10 solution included Epicor Senior Living Solution (SLS).

SLS gives Australian businesses in the aged and home care industry more freedom and flexibility for managing resident and patient information as well as providing integrated financial management options.

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“The massive difference between Epicor and other ERP solutions is that Epicor’s built-in billing and funding engines already understand the aged care and disability sectors. It makes tracking client information and getting payments easy and intuitive,” Bret says.

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When he originally chose Epicor ERP 7, easy-to-understand billing and financial capabilities were already important to Bret. Seeing that Epicor ERP 10 made those processes even more intuitive was a big positive in his books.

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“Most of our people are from a health and care background. They may not be hyper-technical. Despite that, we haven’t had any pushback from our employees and nobody has found the system too technical or difficult,” Bret says.

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The upgrade also included the latest version of Epicor Advanced Requisition Management (ARM), which helps Brightwater eliminate administrative inefficiencies and resource waste during online purchase requisition.

Most importantly, with Epicor ERP 10, Brightwater’s team has gained a single, unified view of their clients. All client data is automatically gathered and stored in a centralised database, giving Brightwater the big-picture insight it needs.

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“The three most important things an ERP can do are (1) streamline the client pipeline and acquisition process, (2) take the complexity out of billing and payments, and (3) help you understand your clients so you can serve them better. Epicor ERP 10 enables us to check off all three of those things in one sweeping gesture,” Bret says.

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“We operate at 28 different sites, so a lot of our work happens out-of-office. We needed an ERP that would work with different systems and connect our sites. Epicor delivers that.”

Results

A CENTRAL CLIENT HUB FOR ALL BRIGHTWATER SERVICES

Brightwater’s ability to respond effectively to client needs depends on their ability to achieve a single view of their clients.

With Epicor ERP 10, Brightwater has the platform they need to build this single unified view. The practical benefits of this include:

- 1 Less need to go outside of their system (e.g., Excel spreadsheets) to collate client data manually.
- 2 Less duplicate data entry, meaning more security for client data and sensitive information
- 3 Resource and time savings which free up Brightwater’s team to refocus on delivering the best user experience.

Now, employees at any of Brightwater’s 28 different locations in Western Australia—and even those working remotely—have instant access to the information they need, whenever they need it.

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“Epicor ERP 10’s ability to access and display information that lives in other systems is a game changer. It gives us the ability to tie financial and client data together, respond quicker, and stay competitive,” Bret says.

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Epicor ERP 10 has only been live at Brightwater for a few months. But Bret is confident that, in time, it will help them significantly improve their overall response time.

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“Epicor gives us the ability to tie different threads together and respond in a faster, more appropriate, and more agile manner.”

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Bret says that his team has actually already experienced time savings, especially in terms of data capturing and billing.

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“Under our old system, a 10-minute phone call used to produce 45 minutes of work. We had to transcribe each call manually into various lists. With Epicor ERP 10, the data is captured automatically within five minutes,” he says.

“Similarly, a billing run used to take us a full day to complete. Now, it only takes us an hour and a half,” he adds.

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With back-end efficiency already improved **by more than 80 per cent**, Bret is looking forward to seeing how Epicor ERP 10 will further enhance their competitive capabilities moving forward.



“The promise of an ERP is that it will make life easier, but that’s often not the case. However, with Epicor ERP 10, we have taken a substantial step toward simplifying our most complex processes.”

Focus on what’s important to your business.

Precise gives you the software and solutions you need to make everyday business processes easier.



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