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– Phil Cullen, Support Services Manager, Bell Tea & Coffee Company



# Bell Tea & Coffee Company get a taste for easy upgrades

An upgrade from Microsoft Dynamics® AX3.2 ERP solution to AX2009 delivered more than a few pleasant surprises for NZ’s leading tea and coffee company. Although the upgrade had been brewing for some time, the abbreviated and streamlined process as delivered by Koorb Consulting left Bell Tea and Coffee Company as satisfied as having a great cup of Bell Kenya bold!

100% locally owned, The Bell Tea and Coffee Company is New Zealand’s oldest and most renowned tea company. In 2006 Bell Tea and Coffee Company expanded further with the acquisition of Burton Hollis (representing Gravity, Burtons and Burton Hollis coffee brands). Today they produce a range of well loved tea brands including Twinings, roast and ground coffee for the supermarket and hospitality channels, and also manufacture a variety of other foods products including soups, jellies and powdered beverages. Despite the diversifying of products the volume of Bell Tea and Coffee Company’s business remains in tea, with manufacturing sites based in Auckland and Dunedin

## Stepping up to 2009 with Koorb

Phil Cullen, Support Services Manager, has been with Bell Tea and Coffee Company for seven years. When he first joined the iconic company, they were running CBA, a DOS based financial package, so part of his mandate was to implement a more modern and comprehensive solution to facilitate growth

and efficiency. Microsoft Dynamics AX3.2 was selected and implemented in 2004.

The company planned to upgrade to AX4 in mid 2008, however following a change in Dynamics AX partner to Koorb Consulting they had a renewed confidence in what could be achieved and instead decided to move directly to AX2009.

Over the years Phil had watched with interest as Koorb Consulting acquired, through the addition of new consultants, new customers in the food industry and accumulated experience, the strongest FMCG credentials of all Microsoft Dynamics AX partners in New Zealand. “This was the compelling reason we moved to Koorb – their sheer depth of FMCG knowledge and the confidence we had in what the company and their team could deliver,” says Phil.



Industry: FMCG  
Project Type: ERP Upgrade

### Quick Facts:

<b>Website:</b> www.btcc.co.nz	<b>Year:</b> 2009	<b>Benefits:</b> <ul style="list-style-type: none"> <li>• Ability to make changes on demand</li> <li>• Enhanced integration with existing IT solutions</li> <li>• Centralised compliance centre</li> <li>• Reduced management overheads</li> <li>• Improved ability to plan for future</li> <li>• Improved order processing</li> <li>• Eliminate manual/duplicative data entry</li> </ul>
<b>Customer Size:</b> 150	<b>Functional areas:</b> Financials, Trade, Logistics, Master Planning, Production, Resources, Projects, Business Analysis, CRM, Service Management.	
<b>Solutions:</b> Microsoft® Dynamics® AX 2009 SP2 Microsoft® Windows Server 2003 R2 Microsoft® SQL Server 2005 Atlas XL – Globe Software	<b>Scenario:</b> Enterprise Resource Planning, Financial reporting, Forecasting & planning, Intercompany trading, EDI	
<b>Workstations:</b> 45 users		

Many at Bell Tea and Coffee Company, including Phil, had considered an upgrade as challenging a process as implementing a new ERP. Previous project plans proposed to them had considerable complexity behind them with up to five stages as each service pack between AX3.2 and AX2009 was uploaded and implemented along with a time frame of many weeks. It was not a prospect they looked forward to.

“We’d delayed the upgrade until it was literally a couple of months away from 2009 coming online, so we discussed this with Koorb and given the additional functionality the new upgrade promised we decided to move directly to AX2009. Koorb had a reassuringly painless approach, telling us that ‘here you are now, we are going to get you to there - and you don’t need to worry about the in-between bits.’ So we decided the time was right.”

Koorb’s abbreviated project plan promised the final transition from AX3.2 to a live version of AX2009 (following testing) within a very few days. From an initial scoping process in February 2009 a test environment was set up at Bell Tea and Coffee Company by the beginning of March, due to go live by 6 April.

## A testing time

Testing was a critical issue for project owner Phil. “Even though we had four weeks to test AX2009, trying to find the time when everyone was so busy anyway, was difficult. I had a key user from each part of the company who was requested to work through a list of actions to test the new system, but it’s hard to pull people away from time critical tasks and get them to concentrate on a new system. In an ideal world we would allocate a set time period per day and a list of tasks to be worked through by allocated people. But the reality is that there are few companies in New Zealand of our size or smaller who would not find that onerous or expensive process. You can only do your best to work through as much as possible within the timeframe.”

Bell Tea and Coffee Company stopped processing transactions with all journals and other open items reversed back. The system was ready to be upgraded at 4.30pm in the afternoon on Friday 3 April.

## It’s all yours

“I rang our consultant at Koorb at 4.30 on the Friday,” said Phil, “and said ‘it’s all yours’. The project plan was that the upgrade would be completed by mid to late Sunday. Instead, they rang me at 12.30 on Saturday to tell me it was finished. I said ‘what

do you mean, it’s finished?’ So I logged in from home, ran a few reports, did a little bit of checking and they were right, it was! We went in on Sunday to run more comprehensive testing - ran the debtors and creditors, ran the stock valuation and it was all working. We’d had an annoying long term \$5 discrepancy between our debtors and general ledger which had proved impossible to rectify – and even that was fixed. We really were elated at the results.”

By 11.30 on Sunday morning Phil and his team were able to sit back and relax with a cup of tea. “Having gone through the upgrade from CBA to Dynamics AX and the sheer amount of work involved, we had the expectation that this would be along the same lines. We anticipated it as being as major as a new implementation, but were proven, thankfully, to be wrong.”

To ensure that any go-live day issues were addressed immediately, Koorb placed a consultant in-house at Bell on the Monday. “Their consultant was on the spot to fine tune any issues as they were discovered,” said Phil. “It was a great hands-on approach by Koorb. We could have done it by phone but this was an instant way to iron out any last minute minor bugs, and we really appreciated it as part of their upgrade strategy.”



## A new look future

Dynamics AX2009 has a completely new look and feel; however the underlying modules are very much the same as before.

For Bell Tea and Coffee Company the move to AX2009 has overcome several issues with AX3.2, especially relating to inventory costing, as well as signalling the time to progress other projects.

Phil and his team had accumulated a list of desired modifications while AX3.2 was in operation; however put these to one side, preferring to action them once AX2009 was in place. Along with now implementing these modifications will be the integration of a new service management module with Microsoft Outlook. Following this they have several other existing modules to reassess and gauge their respective levels of efficiency with a view to improving their ongoing performance.

One mission critical module is the company’s blending system - designed to run with AX3.2, it was essential that it continued to perform with AX2009. Phil and Koorb took the upgrade as a timely opportunity to revise and improve this crucial module as a separate project.

Response to AX2009 within Bell Tea and Coffee Company's team has been positive. "I think the move from AX3.2 to AX2009 is not a huge change in terms of business process. Like anything new, users just need to get used to it and accept working a little differently and embrace the changes," said Phil. "For example the searching is even easier than before. You can build huge amounts of favourites which act as shortcuts to actions, reports etc you carry out frequently - without having to even go into the main system. This is a very popular feature."

## Summary

Bell Tea and Coffee Company as a company is committed to investing in technology as a way forward in a competitive market. And when the next AX upgrade comes, they won't be shy about stepping up to the mark.



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## About Koorb Consulting

Koorb is a 100% NZ owned company - privately owned and operated by the Directors, Nicholas Birch and Paul McDowell-Hook. Both Directors work in the company. The company was established over 12 years ago and has offices in Auckland, Wellington, Christchurch and Dunedin.

The main focus of our business is implementing and supporting Microsoft Dynamics AX and Dynamics CRM. Our 30+ certified consultants together comprise the largest Microsoft Dynamics AX and CRM practice in New Zealand. All are certified and have extensive and wide ranging industry experience.

We have implemented and are supporting close to 60% of all Dynamics AX sites in New Zealand. This is a direct reflection of our strong leadership, highly experienced people and proven methodology.

In both 2007 and 2010 we won the Microsoft Partner Award for the Dynamics ERP Solution of the Year.



For more information about our products and solutions, please contact:

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