



Microsoft Dynamics Customer Solution Case Study



Overview

Country or Region: United States

Industry: County government

Customer Profile

The Pinellas County Tax Collector office processes state and local government transactions for the most densely populated county in Florida. Pinellas County has nearly one million residents.

Business Situation

The Pinellas County Tax Collector office wanted an up-to-date, cost-effective solution to streamline its business management processes, help improve overall efficiency, and deliver consistently reliable data and service.

Solution

The Pinellas County Tax Collector office implemented Microsoft Dynamics™ GP as part of a comprehensive custom-built solution.

Benefits

- Fast adoption and easy integration with familiar software tools
- Improved efficiency and productivity in financial management
- Extensible solution for changing needs

County Government Improves Efficiency with Microsoft Technology

“Microsoft Dynamics GP allows us to provide efficient and effective services to the citizens that we serve.”

Duane Haines, Deputy Tax Collector of IT, Pinellas County Tax Collector, FL

As the Chief revenue collector, the Pinellas County Tax Collector office serves nearly one million residents by collecting more than \$1.5 billion in taxes and fees, as well as issuing licenses, titles, and registrations. The office wanted to automate many processes and gain greater operational efficiencies. Deciding that custom-building a new solution would suit its needs better than any available tax solutions, the office based its new solution on Microsoft® technologies. The solution, Integrated Tax Management Solution (ITMS), uses Microsoft Dynamics™ GP as its financial system backbone. Microsoft Dynamics GP is connected seamlessly to ITMS through the use of Microsoft Dynamics GP eConnect Enterprise Application Integration software and Microsoft BizTalk® Server, and takes advantage of Microsoft SQL Server™ 2005 Reporting Services for key reporting needs. The result of the county’s pioneering efforts is an impressive increase in efficiency.

“When I found out that we were 20 percent automated and 80 percent manual, I started investigating. That was simply totally unacceptable.”

The Honorable Diane Nelson, CFC, Tax Collector, Pinellas County Tax Collector, FL

Situation

The Pinellas County Tax Collector office’s duties are no small tasks: with almost one million residents and growing, Pinellas County is the most densely populated county in Florida. The Pinellas County Tax Collector serves as the Chief revenue official for Pinellas County government, collecting more than \$1.5 billion annually.

The Tax Collector is an independently-elected official whose authority flows from the state of Florida’s Constitution. The incumbent, Diane Nelson, CFC, is a career veteran of 37 years with the Pinellas County Tax Collector office, the last six as Tax Collector. Nelson initiated strategic planning as a business process in 2001, developing the office’s vision, “world-class service, anytime, any place,” and the office’s mission, to “ensure financial responsibility and technical proficiency in the collection and distribution of revenue through the effective use of technology and the continual pursuit of organizational excellence.”

To deliver on the new vision and mission, Nelson quickly assessed the office’s tax collection solution shortly after taking office. “When I found out that we were 20 percent automated and 80 percent manual, I started investigating. That was simply totally unacceptable,” she says.

She started the process by developing a business plan for the county’s tax application. Such a plan hadn’t existed previously to her taking office. In fact, the county’s tax application was on the verge of falling apart. When a crisis arose, the application was simply patched—crisis to crisis, patch after patch. Nelson’s team explained that the application was like a bad patchwork quilt, and now the pieces were starting to come apart.

Nelson was faced with her first important decision: should the county build its own tax solution or buy a product that already existed? After much study and deliberation, Nelson and her team decided that a better business case could be made for custom-building new software by tax collectors and for tax collectors than for buying any existing products. The team tasked itself with the objective of creating a new Tax Application Rewrite (TAR) that would improve customer service to both external customers (taxpayers) and internal customers (taxing authorities) and to do it in the most economical and effective way.

Solution

The next step of the project fell onto the shoulders of Duane Haines, Deputy Tax Collector of IT, Pinellas County Tax Collector, FL, and his team. Every member of Haines’ staff concentrated on the project for more than a year. Says Haines, “We knew the tax collector business, and we were confident we could build a solution on our own. It was a huge undertaking, and the deeper we got into the project, the more we learned about what it would take in terms of the time investment to build it and build it right.”

As the project grew, so did the solution. TAR expanded and became known as the Integrated Tax Management Solution (ITMS).

During this time, the Pinellas County Tax Collector office had chosen Microsoft® Office 2003 as the environment for its business communications and was using programs and technologies such as the Microsoft Office Outlook® 2003 messaging and collaboration client and Microsoft Office SharePoint® Portal Server 2003. Microsoft was keenly impressed with what Haines and his team were doing with the ITMS solution. Microsoft saw the possibility of helping other organizations like Pinellas County achieve their potential with the help of this solution. “Certainly, working

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Carlos Thomas, Chief Deputy Tax Collector,
Pinellas County Tax Collector, FL

with Microsoft broadened the scope of ITMS and helped accelerate its completion,” says Haines. “Yet, we never lost the central idea and purpose: that ITMS would be as near a custom-built application for the tax collector business as possible. We know the business; we work every day supporting our tax collector. ITMS works because it was built by tax collectors for tax collectors in a team environment with the world’s top software company.”

After considering possible options, the Pinellas County Tax Collector team chose to implement Microsoft Dynamics™ GP as the business management solution component of ITMS. The decision was based on the solution’s ability to integrate with other Microsoft products and technologies as well as third-party software tools.

To implement Microsoft Dynamics GP, the Pinellas County Tax Collector team chose Microsoft Gold Certified Partner Stanley Stuart Yoffee & Hendrix, Inc. (SSYH). SSYH provides a full range of professional consulting services to include information technology and business application strategy, software installation, customization, and training business intelligence/data warehousing, and ongoing product support. SSYH also provides targeted vertical industry solutions based upon Microsoft Dynamics products, focusing on the government, not-for-profit, construction/project management, and supply chain (manufacturing, wholesale distribution, and retail) industries.

Benefits

Fast Adoption and Easy Integration with Familiar Software Tools

The fact that Microsoft Dynamics GP “works the way you work” was an important differentiator. Says Carlos Thomas, Chief Deputy Tax Collector, Pinellas County Tax Collector, FL, “We are able to leverage our Microsoft technologies and expand on them.

Microsoft Dynamics was the best technology choice for us to automate our business processes. With Microsoft Dynamics GP, we’re able to give our team the right tools at the right time to do their jobs.”

Indeed. One of the Microsoft Dynamics GP strengths is its user interface (UI), which ensures a consistent look and feel throughout the solution itself as well as across other Microsoft Office applications that users are familiar with. And because Pinellas County chose to build their tax management solution on Microsoft .NET technologies including the Microsoft Visual C#® development tool, it’s very easily customized, allowing entities like Pinellas County to tailor the solution to comply with the latest tax laws. Before the ITMS solution, the Pinellas County team had to create layer upon layer of workarounds every time new regulations were made. Now, because ITMS is designed to be updatable, the integration with Microsoft Dynamics GP can be maintained, giving them a fully integrated business management system.

Improved Efficiency and Productivity in Financial Management

Another strength that Microsoft Dynamics GP brings to the Pinellas team is within trending and forecasting. “This was a big key for us,” says Thomas. “Our old system didn’t really allow us to develop any business metrics. Microsoft Dynamics GP will allow us to be more granular and ultimately serve our internal and external customers better.”

With the help of Microsoft Dynamics GP and Microsoft SQL Server™ 2005 Reporting Services, the Pinellas County Tax Collector team has gone from creating and tracking reports manually to having nearly 100 reports ready to be created with a few simple keystrokes. In fact, the Florida Department of Revenue is demanding that counties provide certain trending reports, and at the moment,

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Pinellas County can now comply with the Florida State requirements.

The Pinellas County Tax Collector team is looking forward to other efficiencies that Microsoft Dynamics will enable. "In the past, it's taken us half a day to balance our receipts from the previous day," says Haines, noting how laborious, time-intensive, and employee-intensive the task has been. "With Microsoft Dynamics GP, I'm expecting that we'll be positioned to significantly reduce this time."

Total Tax Solution

Haines says, "Microsoft Dynamics GP allows us to provide efficient and effective services to the citizens that we serve."

With the help of Microsoft Dynamics GP, the Pinellas County Tax Collector team is delivering on its mission and vision. "We started out wanting a tax application, and we got a total tax solution that will be entirely integrated," says Nelson. "The public is demanding that government be more efficient. Microsoft Dynamics GP is helping us streamline our processes and meet and exceed our customers' expectations."

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to: www.microsoft.com/dynamics

Software and Services

- Products
 - Microsoft Dynamics GP
 - Microsoft SQL Server 2005 Reporting Services
 - Microsoft BizTalk Server

Partner

- Stanley, Stuart, Yoffee & Hendrix

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