

Case study part 1: rescue

Meriton



CLIENT

Meriton, created in 2019, is a U.S.-based holding company that is focused on building a portfolio of the most trusted independent brands in the world of commercial HVAC.



SOLUTION

The CuroGens team started the process by researching what the client needs in order to effectively do business, and focusing on pragmatic problem solving. Our aim was to get the client to a "minimal viable product" (MVP) as quickly as possible. The plan was to then build on that MVP over time to make the client's system more robust and transform their business.

Client Problem/Need

In 2021, Meriton was experiencing challenges with the implementation of Microsoft Dynamics 365 Finance and Supply Chain Management. Another D365 implementation partner had begun the project, exceeded the budget, and was behind schedule. Inefficiencies related to synchronizing the systems to standardize records were causing many headaches and problems. Additionally, dozens of poorly executed custom code implementations had led to data errors and incorrect reporting. After having gone live with only two business units and the one partially live legal entity, Meriton contracted with CuroGens to help them expand their business into key markets across the U.S.

The Outcome

Following a few months of getting to know their business needs and technical requirements, we managed to quickly fix critical code and necessary migrations to get the last business unit live at the beginning of 2022. Following go-live, we quickly switched our focus to fixing remaining noncritical code bugs. All code fixes were fully delivered by June, just 9 months after initial contact. In all, it took just 120 days to rescue this project.

Meriton and CuroGens were able to work together and manage unforeseen setbacks through daily communication and transparency. With a proactive approach, CuroGens is able to recognize issues early, communicate them to the client, and execute a solution plan.

Throughout the Meriton rescue project, we had three people with complementary skillsets dedicated to the project full-time – a dedicated project manager, a lead functional consultant and a lead technical consultant – as well as an additional developer helping out part-time as needed.

Our rescue was so successful that not only did Meriton refer us to another company having troubles with a failed implementation (in a completely different sector, the medical industry), they also wanted to expand our role within their operations to help upgrade and migrate further legal entities. This introduced new challenges relating to the volume and speed of migrating and integrating successive acquisitions. Read on in part 2 of this case series to find out how we transitioned from the rescue project into providing "full-suite" consultation services.



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Case study part 2: acquisitions

Meriton



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Meriton, created in 2019, is a U.S.-based holding company that is focused on building a portfolio of the most trusted independent brands in the world of commercial HVAC.

Client Problem/Need

Following up on the successful rescue of one of Meriton's legal entities detailed in an earlier case study, Meriton asked CuroGens to extend its work to further legal entities which the company was rapidly acquiring.

In order to adapt to the changing demands, we assigned a secondary team of two developers and a technical architect to design point-of-sale custom code, in addition to the original four team members.

Technically, Meriton's system is somewhat complex. Their ERP requires various integration pieces with their CRM and an ISV system for managing HVAC equipment rentals. Additionally, they have done a lot of internal customization. All of this is something that we take into account when working with clients' ERP systems; this way, we minimize mistakes and maximize our efficiency. Along those lines, something that really makes our post-rescue work with Meriton stand out is the rate we have been able to migrate their new acquisitions.

The Outcome

Seven of Meriton's acquisitions (not counting Meriton itself) are now on Dynamics 365 as of early 2024. During this process, CuroGens has performed a successful double migration (two companies at the same time). Each acquisition has had slight differences that needed to be integrated into Meriton's overarching system. This is a feat of coordination that is difficult to pull off, but CuroGens has been able to do it thanks to our talented team, work ethic, and strong communication skills.

The Solution

After the code fixes were delivered in June 2022, CuroGens and Meriton agreed to set a fairly aggressive target of 120-day cycles per further migration. This 4-month schedule can be further broken down, starting with approximately 4 weeks spent on "discovery". During the discovery phase, our consultants met with end users in the acquisition company's financial department and their leadership and intimately get to know their financial workflows and specific needs.

Following discovery, another 4 weeks were spent building the ERP environments, cleaning extracted data and converting old data into formats that the new system understands. Meriton has dedicated trainers that then go in to test the processes and workflows we create. When the environment was built, the CuroGens team moved on to a four-week period of UAT (user acceptance testing), where end users check that data are formatted correctly and make sure their personalized workflow processes are working well.

In the last of the 4-week blocks, we took a new extract of the company's live data in order to ensure up-to-date information in the new system and fix any bugs encountered during UAT. Our team spent the last few days before go-live combing through the data more precisely in order to check that everything is as it should be and preparing the environment to go to production. Then, after go-live, CuroGens pivoted to two weeks of support, and after another two-week preparatory break, we began a new round with another company.



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