



LEARNING RESOURCES:
BRINGING PLAYFUL
LEARNING TO MILLIONS
OF CHILDREN

 **SIKICH**

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LEARNING RESOURCES GROWS AND BUILDS ITS FUTURE **ON MICROSOFT DYNAMICS 365**

Learning Resources, a leader in empowering education by means of innovative toys and learning kits, decided to modernize its business technology when dramatic growth strained the capabilities of legacy software. Collaborating with Sikich, the company deployed Microsoft Dynamics 365 Finance and Supply Chain as its main business management technology. The solution meets Learning Resources' goals for operational excellence and productivity, and enables ongoing transformations in how executives, managers, and employees serve customers.

HEADQUARTERS:

Vernon Hills, IL

INDUSTRY:

Wholesale Distribution | Education

ENGAGEMENT:

Consulting and deployment of Microsoft Dynamics 365 Finance and Supply Chain

KEY OUTCOMES:

- Management platform for the entire business
- Insight and transparency across operations
- Efficient, accurate forecasting which enables realistic production planning
- Winning and serving more customers
- Process automation to minimize routine chores
- Optimized distribution and warehouse operations

www.learningresources.com

UNIQUE BUSINESSES SATISFY UNMET EDUCATIONAL NEEDS

Learning Resources, founded in 1984, designs and distributes educational toys that help children grow their STEM, reading, writing, and fine motor skills. Many Learning Resources products, like Beaker Creatures or Coding Critters, win Toy of the Year awards and are hugely popular.

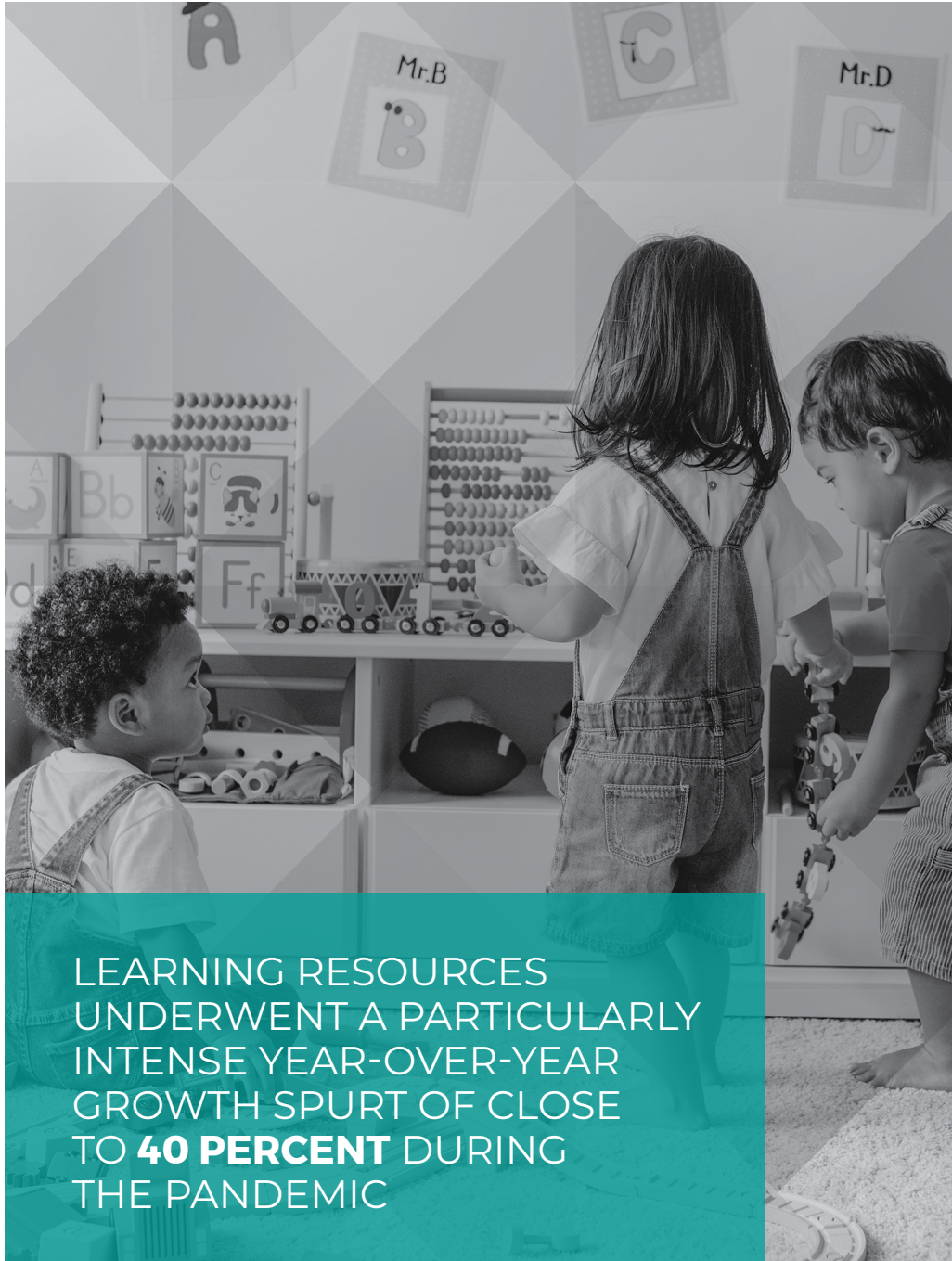
A SISTER COMPANY, **HAND2MIND**, CREATES KITS THAT ASSIST TEACHERS IN ADVANCING THE STEM, LITERACY, AND SOCIAL COMPETENCIES OF YOUNG LEARNERS.

EDUCATIONAL INSIGHTS, A BRAND OF HAND2MIND, OFFERS A COLLECTION OF TOYS TO INSPIRE CHILDREN TO LEARN THROUGH CREATIVE PLAY.

In addition to the company's operations in North America, since 1994 a Learning Resources subsidiary based in the U.K. serves the educational market in Europe, the Middle East, Africa, and India.

In Learning Resources' multi-channel distribution model, parents and educators can purchase directly from the websites of its three brands. The company partners with educational publishers to bring its products to market. In addition, it sells directly to school districts and educational institutions. Several leading online and physical retailers also offer Learning Resources products.





LEARNING RESOURCES
UNDERWENT A PARTICULARLY
INTENSE YEAR-OVER-YEAR
GROWTH SPURT OF CLOSE
TO **40 PERCENT** DURING
THE PANDEMIC

UNPRECEDENTED GROWTH AND CONTINUED HIGH DEMAND

After experiencing many years of double-digit growth, Learning Resources underwent a particularly intense year-over-year growth spurt of close to 40 percent during the pandemic, when many parents looked to the company to help them guide their children's learning while kindergartens and schools were closed. To help parents at a time of urgent need, the company made many of its products and supporting documentation available as free downloads, thereby garnering new customers around the globe. Today, as many families and schools do whatever they can to help students who may have fallen behind during the pandemic years, Learning Resources continues to find higher demand than in pre-pandemic times.

AMBITIOUS GOALS FOR TECHNOLOGY MODERNIZATION

At Learning Resources and Hand2Mind, creating beneficial, lasting relationships with customers and improving processes to serve them more efficiently are continuous efforts. Ken Platt, Chief Technology Officer at Learning Resources, says, “We always aim for operational excellence. We’re very advanced in how we use technology everywhere and constantly evolve it.”

As demand and growth skyrocketed, an older enterprise resource planning (ERP) system no longer met the two companies’ needs. This legacy software could not be upgraded and was unable to scale to support additional business entities or warehouse locations without a large licensing investment. When executives and managers needed complete and current information, for example, to forecast and plan demand, it wasn’t readily available. Learning Resources faced cybersecurity risks because the software could only run on outmoded operating systems.

In addition to finding a scalable, secure solution, Learning Resources had several other goals for replacing its aging software with modern ERP, such as:

- Support efficient, fast-moving, error-free warehouse operations.
- Allow responsive, reliable, anytime forecasting and demand planning to address customer needs as they surface.
- Maintain enough inventory in multiple warehouses to keep back orders from individual, institutional, and corporate customers under two percent.
- Bring visibility to supply chain management, order fulfillment, and other processes.
- Enable efficient electronic data interchange (EDI) communications with more than 120 trading partners in integration with the ERP system.



“We always aim for **operational excellence**. We’re very advanced in how we use technology everywhere and constantly evolve it.”

Ken Platt, Chief Technology Officer at Learning Resources



“Strong forecasting was one of the big drivers for our adoption of Microsoft Dynamics 365 Finance and Supply Chain.”

Darcy Foley, Controller at Learning Resources

IDENTIFYING AND IMPLEMENTING A BEST-FIT SOLUTION

On its own and by working with a software selection advisory firm, the Learning Resources team reviewed available ERP solutions. It found that many of them did not provide the complete range of functionality the company looked for, were too difficult to learn and use, or could not easily integrate with the other systems that the business would continue to rely on. The one bright exception was [Microsoft Dynamics 365 Finance and Supply Chain](#), at the time called Microsoft Dynamics 365 Finance and Operations. Darcy Foley, Controller at Learning Resources, says, “Strong forecasting was one of the big drivers for our adoption of Microsoft Dynamics 365 Finance and Supply Chain. Its warehousing and assembly production planning capabilities also differentiated it from other products we reviewed.”

Microsoft Dynamics 365 not only met all requirements Learning Resources had identified, it also felt like a welcome, familiar fit. The company already used other Microsoft solutions, including [Microsoft 365](#). It maintained databases on the [Microsoft Azure](#) cloud, and deploying a cloud-based ERP system from Microsoft looked like a natural next step. Even better, it was going to be easy for employees to begin working with Dynamics 365. “If you’ve ever implemented any other ERP system, you know that the learning curve can be very steep,” Platt comments. “But that’s not a problem you face with Dynamics 365. It’s very intuitive and works just like other Microsoft products.”

STRATEGIC COLLABORATOR WITH STRONG CREDENTIALS

Next, Learning Resources had to find a technology partner to help deploy, configure, and integrate Microsoft Dynamics 365 Finance and Supply Chain. After an early selection didn't prove to be a good match, Platt asked Microsoft for recommendations and learned about Sikich. The consultancy is a successful, highly reviewed provider of ERP services and also a member of the Microsoft Dynamics Inner Circle. Platt notes, "We knew that, as a member of the Microsoft Dynamics Inner Circle, Sikich would be aware of future developments that could benefit us. Also, Sikich relationships with Microsoft and other technology providers made it possible for us to get to know people with whom we could not have connected with otherwise."

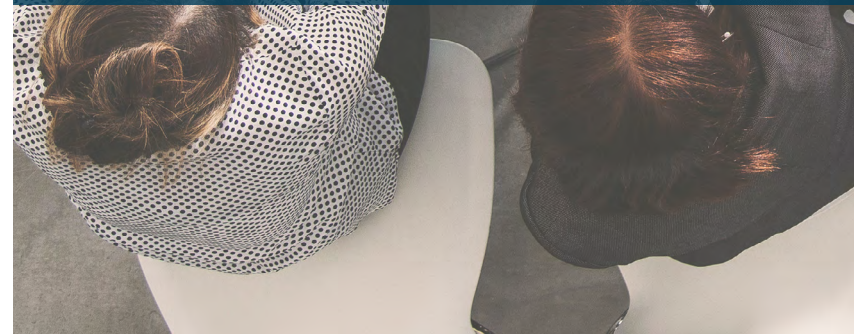
DEPLOYMENT SUCCESS UNDER FORBIDDING CONDITIONS

During the pandemic, when companies curtailed business travel to keep their people healthy, Sikich delivered almost the entire ERP deployment until close to the go-live date through Microsoft Teams. The consultants used the Sikich HEADSTART methodology and resource, which comprises a complete, functional instance of Dynamics 365 Finance and Supply Chain as well as hundreds of standardized business processes optimized for distribution companies according to industry best practices.



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Ken Platt, Chief Technology Officer at Learning Resources





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Darcy Foley, Controller at Learning Resources

Continuously updated and incorporating the experience of hundreds of successful ERP projects, **HEADSTART** can greatly accelerate deployments while minimizing their risks. Many times, the **HEADSTART** ERP configuration and processes already meet 90 percent or more of clients' ERP requirements before any adjustments are made. Learning Resources took full advantage of the insight Sikich offered. “We were always asking the Sikich consultants about best practices for our industry,” says Platt.

“They did a good job of sharing their expertise. We implemented many features in Dynamics 365 the way we did because that's what Sikich advised us to do.”

Together, the Learning Resources and Sikich project team achieved a successful ERP deployment under circumstances neither organization had previously experienced. “The main advantage of working with Sikich was having partners with whom we could have strategic conversations that helped us see things differently,”

Foley says. “The Sikich consultants are very professional and empathetic. I also appreciated that they were onsite about a half week before we went live, stayed through the go-live weekend and the next week, and supported us in the transition to the new ERP system. That was tremendously helpful.”



“Once we went live with Dynamics 365, we saw **massive improvements** throughout. We’re going to achieve more, because with this system there are so many **opportunities to grow.**”

Scott Ringel, Warehouse Systems Manager and WMS Process Improvement Engineer at Learning Resources



A STEP UP TO GREATER **OPERATIONAL EXCELLENCE**

Learning Resources found that implementing Dynamics 365 Finance and Supply Chain for all its business entities was far less time-consuming and difficult than expected, and welcome changes happened sooner than anticipated. Scott Ringel, Warehouse Systems Manager and WMS Process Improvement Engineer at Learning Resources, says, “Once we went live with Dynamics 365, we saw massive improvements throughout. We’re going to achieve more, because with this system there are so many opportunities to grow.”

ERP FOR EVERYBODY

More than 350 Learning Resources employees at corporate headquarters, two satellite offices, and six warehouses use Dynamics 365 Finance and Supply Chain to do their jobs. They rely on the ERP system to run processes in key areas of the business, including sales, marketing, financial management, order management, forecasting, procurement, product and kit assembly, demand and production planning, picking, warehousing, shipping, and inventory management.

Warehouse and distribution teams use workstations and tablets to access ERP capabilities, with some workers uploading information from scanners and other equipment to Dynamics 365. Everybody else, including those team members who often work remotely, relies on laptops. Through the Azure cloud, employees can securely access their ERP system from any location.

Learning Resources workers responded positively to the new solution. “Dynamics 365 surprised me personally because of its adaptability, especially compared to our previous software,” says Ringel. “Without any previous Dynamics 365 experience, I can configure and adjust warehouses quickly and confidently.”

CONNECTED DATA FLOWS AND SOFTWARE-POWERED PROCESSES

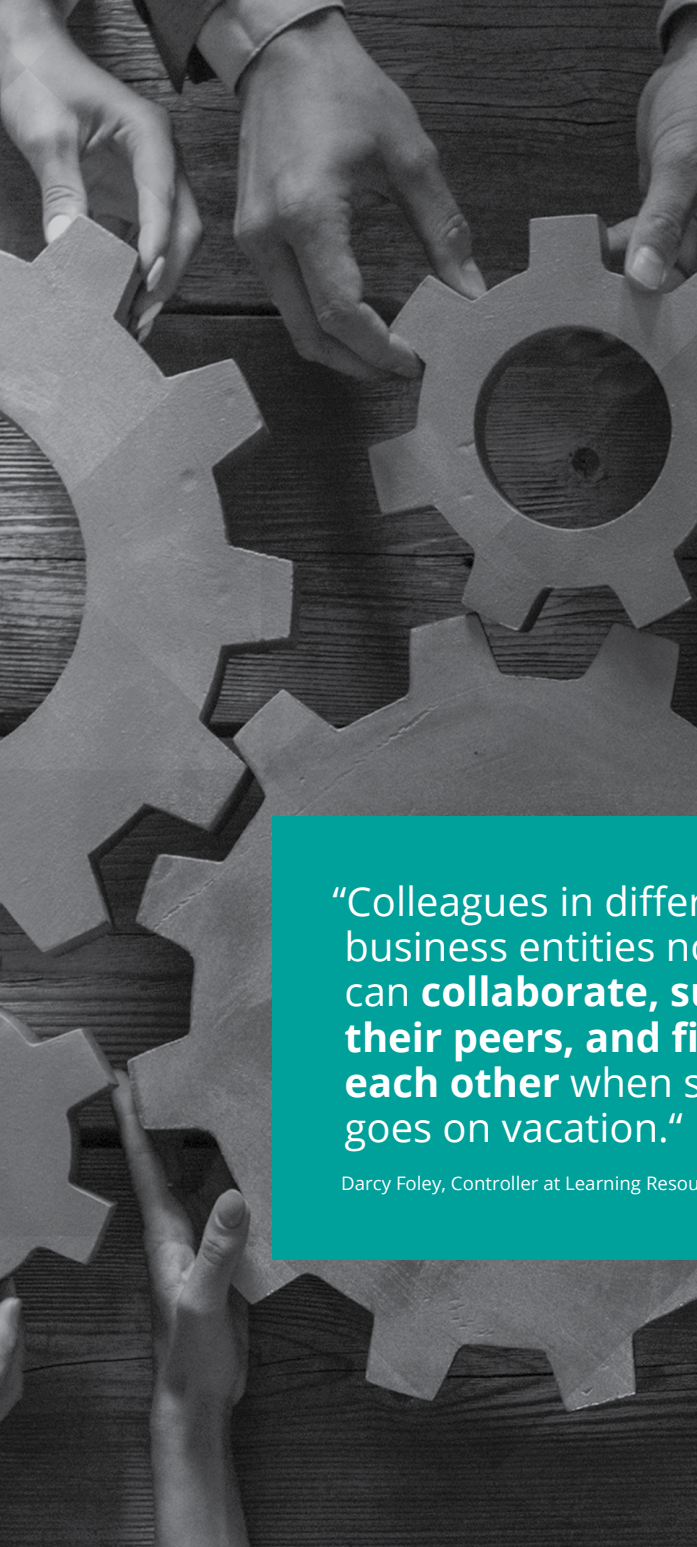
A complete, always current set of Learning Resources' business data resides in a data lake set up by Sikich, where it is always accessible for analytics. [Microsoft Power BI](#) accesses both Dynamics 365 system data as well as the data lake to enable visualization, reporting, and analytics based on realtime information.

The ERP system is at the hub of an integrated, unified technology environment. Dynamics 365 interacts with autonomous mobile robots (AMR) in the warehouse. The AMRs pick products and place them onto a conveyor belt. That conveyor belt, in turn, takes the product cartons to shipping stations for dispatch as part of lighter than truckload (LTL) transportation.

One important software integration connects Dynamics 365 with [SPS Commerce](#) software to enable EDI communications, which in turn are linked to workflows in the ERP environment. Dynamics 365 also interacts with [Avalara AvaTax](#) to automate tax calculations and with [SK Global](#) software to simplify banking and payment management. Integrations with other software tools extend and refine the ERP solution to support pack lists and manifesting in the warehouse, voice picking, credit card processing, and other activities. Platt says, "You can't be a Microsoft Dynamics 365 ISV without going through a stringent accreditation process. It's a great benefit for us that these vendors are Microsoft-approved and align their code with the regular Dynamics 365 updates, so that our only job is to install and configure their solutions."

STRONGER SECURITY, LOWER EXPENSES

For Learning Resources, Dynamics 365 proved to be cost-efficient and secure. Reducing some expenses, the company eliminated several vendors and support agreements following the deployment. State-of-the-art security on the Azure cloud augments the company's own security measures. "Microsoft provides a strong layer of cybersecurity with Dynamics 365 in the cloud," Platt comments. "They have wonderful tools for managing security."



“Colleagues in different business entities now can **collaborate, support their peers, and fill in for each other** when somebody goes on vacation.”

Darcy Foley, Controller at Learning Resources

REAPING THE BENEFITS OF **MODERN CLOUD ERP**

Across the operations of Learning Resources and Hand2Mind, technology users report beneficial, sometimes unexpected, outcomes from their Dynamics 365 solution.

MANAGEMENT PLATFORM FOR THE ENTIRE BUSINESS

For Learning Resources employees, it was a new experience to work within a system that can support all business entities and which combines capabilities traditionally found in separate tools, like ERP, customer relationship management (CRM), and warehouse management system (WMS) software. That allows a single, unified team instead of multiple groups to handle demand planning, procurement, and other functions. The multicurrency and multicurrency capabilities of Dynamics 365 make it possible to bring the U.K. subsidiary of Learning Resources onto the same ERP platform.

Financial management for Learning Resources and Hand2Mind today runs on a single, coherent system instead of several general ledgers. Foley comments, “As part of the new Dynamics 365 implementation, we put together a shared chart of accounts so that it would be easier to bring together the two companies’ financials in a consolidated fashion. Colleagues in different business entities now can collaborate, support their peers, and fill in for each other when somebody goes on vacation. That’s definitely improved people’s morale.”

DELIVERING INSIGHT AND TRANSPARENCY ACROSS OPERATIONS

Following the integration of Dynamics 365 Finance and Supply Chain, Power BI, Microsoft 365, and the data lake, managers at Learning Resources always have instant access to complete, up-to-the-moment information regarding any aspect of the business. “The integration of all sources of information for us was an important differentiator between the Microsoft technologies and other products we reviewed,” says Platt.

Many business roles and processes benefit from greatly enhanced visibility. For example, when customers inquire regarding the status of their orders or warehouse managers wonder about the timing of deliveries, they can immediately receive or find an accurate response to their questions. Learning Resources executives rely on real-time decision support through dashboards and analytics facilitated by Power BI.

Describing just one of many business areas that benefit from Dynamics 365 and system integrations, Wanda Burn, Senior Director of Warehouse Operations at Learning Resources, says, “We no longer have to wait every hour for updates, we can look at current information anytime. For example, if I want to know how many containers are coming in, I no longer need to call procurement, because I have access to that data. We’re also thrilled that we can create KPI reports, which was previously not possible. What’s more, I can go back in time, see how we performed, and then plan labor according to historical data.”



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Ken Platt, Chief Technology Officer at Learning Resources



EFFICIENT, ACCURATE FORECASTING ENABLES REALISTIC PRODUCTION PLANNING

Before the ERP modernization, forecasting required material requirements planning (MRP) software to run for many hours during the night to avoid interfering with everyday activities. Managers ran this process for each business entity only once a month or even less frequently. Foley says, “Accurate forecasting is paramount to our success, so we can buy the products we need and assemble them in a timely manner. One of the Sikich consultants was incredibly helpful with helping us consider industry-best practices for setting up our forecasting.”

Today, instead of using a specialized software tool, Learning Resources runs integrated forecasting in Dynamics 365 Finance and Supply Chain at any time and quickly receives results at the level of business groups instead of repeatedly forecasting for the entire company. “We can choose which items we want to be re-forecasted more than others, which is a great advantage,” notes Foley. “For me personally, forecasting is the area where I’ve seen the most benefit in moving to Dynamics 365 from our legacy system.” In production planning, what-if capabilities in Dynamics 365 extend forecasting to give managers greater confidence and assurance in their decisions.

“**FORECASTING IS THE AREA WHERE I’VE SEEN THE MOST BENEFIT IN MOVING TO DYNAMICS 365 FROM OUR LEGACY SYSTEM.**”

Darcy Foley, Controller at Learning Resources



WINNING AND SERVING MORE CUSTOMERS

Learning Resources abandoned its previous customer relationship management (CRM) system and now takes advantage of the CRM capabilities in Dynamics 365. That change was advantageous at a time when the company made much of its intellectual property available for free to parents and educators, gaining the interest and loyalty of many new prospects and customers. Platt explains, “We had more than a million people visit our website to download materials. The Dynamics 365 CRM tools greatly helped us with capturing data and running marketing campaigns to connect with them. These CRM capabilities allowed us to accomplish more than we could have done with our previous software.”

Microsoft Dynamics 365 Finance and Supply Chain makes it possible to manage all business activities to meet customer needs in the most efficient and reliable manner. Foley says, “We use Dynamics 365 throughout our operations. It allows us to accomplish what we need to do to deliver our educational products to customers.”

In Hand2Mind operations, the new ERP system has brought simplicity and reassurance to the production and distribution of complex kits. “We

rely on the Dynamics 365 bundling functionality to assemble educational, multi-box kits with hundreds of components,” Foley adds. “The solution’s what-if feature is critical for us to evaluate our customers’ needs, procure the right components, assemble our products, and ship them when customers expect them.”

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Darcy Foley, Controller at Learning Resources

AUTOMATING TO ACCELERATE PROCESSES AND MINIMIZE ROUTINE CHORES

Automations in Microsoft Dynamics 365 Finance and Supply Chain allow Learning Resources to run many processes at outstanding speed and efficiency. For example, employee teams rely on automated accounts payable approvals; automatic wave processing to expedite shipping, production, and picking; and automatic routing to streamline production. The solution's LTL functionality takes complexity out of logistics planning. Platt says, "We will automate a workflow if it makes sense and results in process improvements. Sikich did most of the heavy lifting in helping us create automations."

Learning Resources ships some large customers' orders directly to them from contract manufacturers in China. Managing this process used to be a laborious, manual activity, but now it runs as an automation in Dynamics 365. "Fulfilling international orders once was a tremendous hurdle for us, but now it has greatly improved," Platt says. "It's a tremendous saver of time and money for our customers."



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TRANSFORMING DISTRIBUTION AND WAREHOUSE OPERATIONS FOR OPTIMAL PRODUCTIVITY

In Learning Resources' critical distribution and warehouse operations, Dynamics 365 Finance and Supply Chain enables many tangible improvements that make it easier for the fast-growing company to deliver its products to customers. For example:



RAPID RECEIVING

This task has become speedier and easier. Ringel describes, "We've realized a massive improvement in the way we receive goods. We can take products directly from the truck and put them away quickly. This task was more cumbersome with the previous system."



ENSURING ACCURACY IN INVENTORY MANAGEMENT

Cycle counting supported by Dynamics 365 results in more efficient and accurate inventory tracking. Workers no longer need to wait for information to update because it's always current in the ERP environment, and they no longer have to set up locations for counting before somebody performs the actual work. Warehouse employees can count anytime and have the flexibility to allow for differences in the criticality of inventory items by determining the frequency of cycle counting. An automated workflow gives supervisors the option of approving discrepant counts or requesting a recount.



STREAMLINED WAREHOUSING IN MORE LOCATIONS

To help meet demand for Learning Resources and Hand2Mind products, the business brought additional warehouses online during the pandemic and since then. The warehouse management functionality in Dynamics 365 includes a multi-warehouse feature, which is key to managing these locations efficiently. System integrations, automations, and voice-enabled operation contribute to increases in productivity. "The Dynamics 365 WMS capabilities have helped Learning Resources and Hand2Mind generate warehouse efficiencies," says Burns. "We receive and put away pallets faster, ship more quickly, and are accurate at every step."



FAST, ACCURATE PICKING

Thanks to voice picking capabilities and automations in Dynamics 365, picking has accelerated, which means Learning Resources and Hand2Mind customers can receive their orders sooner. Burns says, "We get to orders more promptly, see exactly what we need, set up the team for the best way to perform the work, and get products out the door a lot faster."




COSTING INSIGHT AND CONTROL

By managing voyages in Dynamics 365, Learning Resources can now track the landed costs of distribution, including the full details on shipping containers, goods in transit, and other details. Sikich helped Learning Resources managers understand the voyages functionality and implement it to fit its processes and report landed costs accurately and completely.

A FUTURE OF CONTINUING GROWTH AND INNOVATION

Learning Resources and Hand2Mind continue to grow by staying abreast of unmet customer needs and emerging trends in the educational market, aiming to develop products that competitors have not thought of. Collaborating with Sikich helps the companies learn about and benefit from enhancements to Dynamics 365 Finance and Supply Chain. “We can expand and evolve with this software,” says Platt. “On our Dynamics 365 foundation and with help from Sikich we can manage the constant change and growth in our business.”

The two companies are looking for ways to automate more workflows in Dynamics 365, thereby freeing employees from repetitive tasks. They also will take advantage of the ERP system to further refine their costing. Data analytics and reporting to deliver business insight will evolve with Dynamics 365 as the main data source. Teams are excited to explore recently enhanced features like managing bundles or promising, newer capabilities like AI with Dynamics 365 Copilot.



“On our Dynamics 365 foundation and with help from Sikich we can **manage the constant change and growth** in our business.”

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“Sikich is going to be our **value-added** reseller for the next 20 years when it comes to Dynamics 365. I would recommend them to other people because they’ve got the **right experience** and they’ve **built a great crew.**”

Ken Platt, Chief Technology Officer at Learning Resources

THE RIGHT PARTNER MATCH FOR LONG-TERM SUCCESS

Two Sikich team members continue to work with Learning Resources under the terms of a long-term support contract. The scope of their engagement includes improving the speed of wave processing and refining the integrations and interactions between Dynamics 365 and other software systems, such as Numina warehouse automation solutions.

Based on their experience so far, executives and team leaders at Learning Resources voice positive feedback for Sikich as they look forward to a continuing partnership. “I would recommend Sikich to anyone who is working in not just the educational space, but looking to implement software to support warehousing, distribution, and assembly,” says Foley. “Sikich has an excellent way of working with other companies and partners to achieve a fabulous implementation.” Ringel adds, “I would definitely suggest Sikich to another company or a friend of mine, because they taught me everything I needed to know about Dynamics 365, and I would love that person to go through the same process.”

Highlighting what she values most in the Sikich engagement, Burns emphasizes, “The biggest benefit of working with Sikich is that it’s not an organization that sells you something and then walk away. It’s an organization that works with you to implement a process and is still always readily available if you have questions or need assistance.”

Summarizing these impressions, Platt closes, “Sikich is going to be our value-added reseller for the next 20 years when it comes to Dynamics 365. I would recommend them to other people because they’ve got the right experience and they’ve built a great crew.”



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ABOUT SIKICH

Sikich is a leading professional-services firm that is among the top 1 percent of all enterprise resource planning solution partners in the world and ranks as one of the United States' Top 30 CPA Firms. Sikich is also ranked as number 9 in the country's top 100 technology providers. To every project, Sikich ERP and CRM experts contribute more than 30 years of team experience and an outstanding track record with a success rate of 97 percent. Sikich partners with the industry leaders, including Microsoft, NetSuite, and SonicWALL. Sikich is a Microsoft Solutions Partner for Business Applications and Microsoft Dynamics Inner Circle Partner focused on delivering technology solutions for tangible business improvement and organizational excellence.

To learn more about Sikich, go to www.sikich.com/technology or contact info@sikich.com.

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