



Rise Above the Cloud

Propel your business with our customer focused team & superior software solutions

Navigating the New Normal

 **Acumatica**

The Cloud ERP

Gold Certified Partner

Business Anywhere: Acumatica Software Reviews

“While our competition struggles to adapt, our team has been able to work anywhere and maintain business continuity under any scenario because we’re running PennAir on Acumatica in the Cloud.”

Seth Bray, CEO, PennAir

“I am really thankful we have Acumatica in place right now. If we had been still operating from the old platform, we would have had some significant challenges with people working from home and staying connected. Keep up the good work!”

Alex Craster, Owner, Craster

“Palmer Food Service is a Food Service client running Acumatica. Being in Tennessee, we first got hit with the tornados and while the national distributors were out of business, Palmer picked up the slack. Now with the COVID-19, food distributors like Palmer are a lifeline for their regional markets.

Liz Palmer Gibson, VP Sales & Marketing, Palmer Food Service

“Mobility is an important driver for us. Thanks to Acumatica, our employees can connect to the same central system from any site.”

Thibault Riester, President/Founder, Controleplus France

“Power Storage Solutions is not missing a beat, thanks to our decision to go with Acumatica.”

Derrick Elledge, VP Operations, Power Storage Solutions

- Introductions
- Value Approach From Clients First Business Solutions
- Navigating the New Normal with Kent Richeson (Acumatica)
- Fast Track Methodology and Phased Approach
- Total Economic Impact of Acumatica (ROI)
- Customer Testimonial
- Q/A

We are Clients First



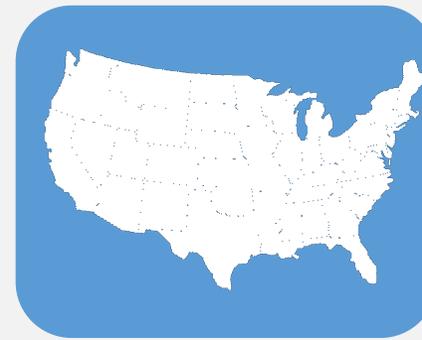
At a Glance



Over 750
customers



90+
employees

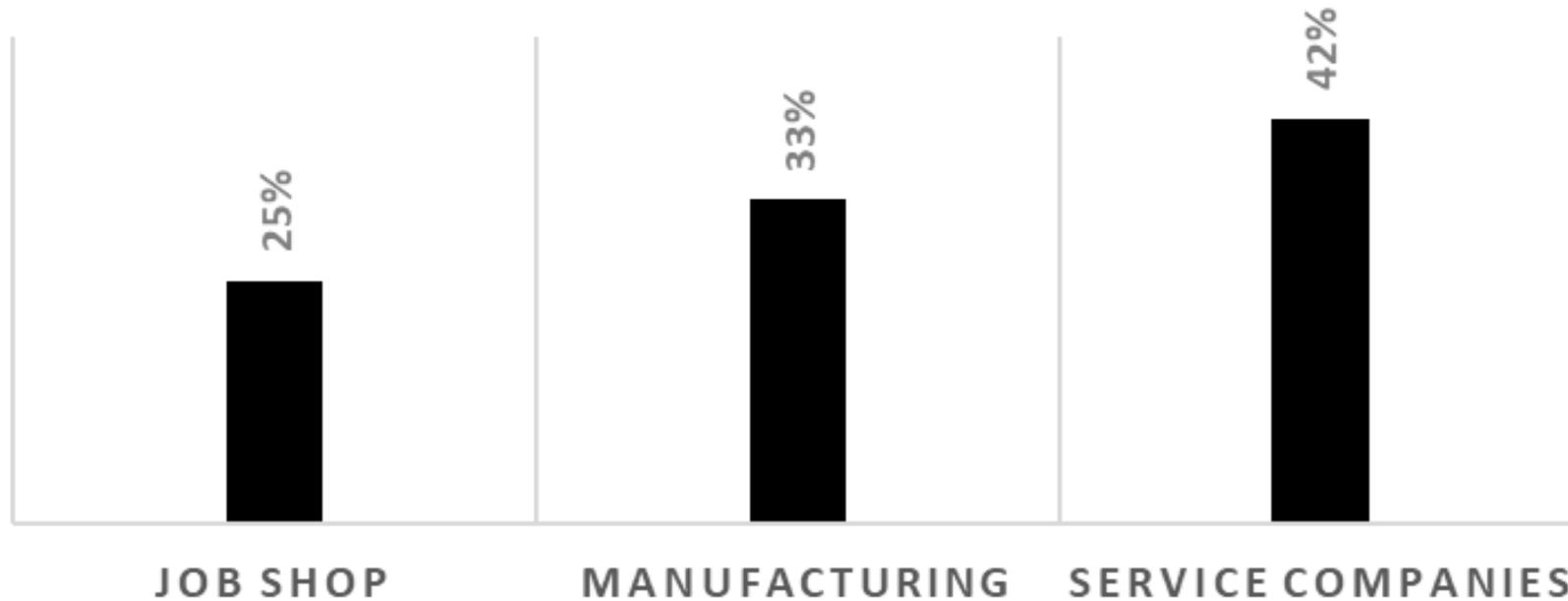


7
offices

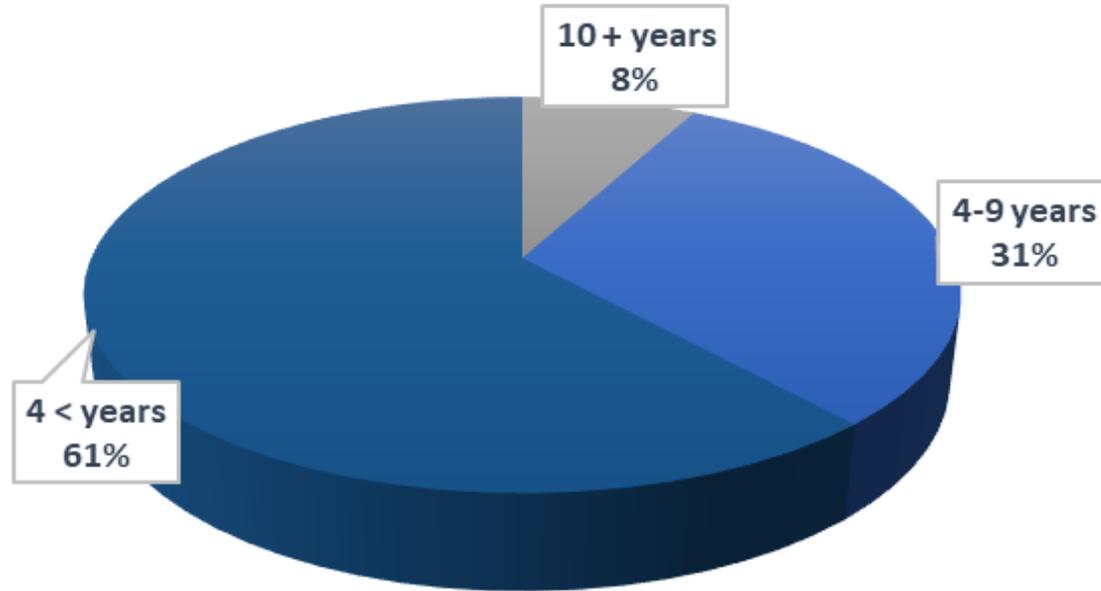


\$26 million
revenue

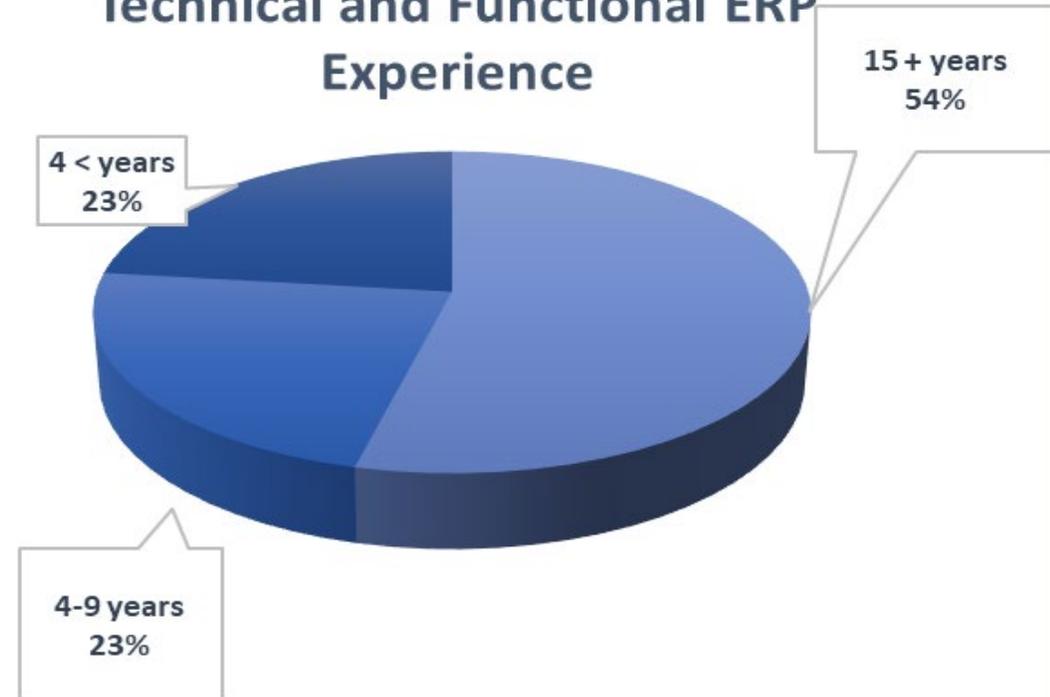
CUSTOMER PERCENTAGES BY PRIMARY INDUSTRY - ACUMATICA



Acumatica Team: Years at CFBS



Technical and Functional ERP Experience



How to unlock and Navigate the New Normal

Kent Richeson

Acumatica Cloud ERP Specialist

Fast Track Methodology



- Project Scope
- Phased Approach Benefits
- Fast Track Benefits
- Project Success Factors
- Calculating ROI



Manufacturing

- MRP
- BOMs
- Purchase Management
- Inventory Management
- Order Management
- Financials

Distribution

- Inventory Control
- Order Management
- Monitoring and Automation
- Financials

Project Accounting

- Project Cost Tracking
- Manage Project Quotes
- Control Change Orders
- Flexible and Accurate Billing
- Financials

Field Services

- Scheduling, Dispatching and Call Center
- Route Planning
- Mobile Service Management
- Dashboard and Business Intelligence
- Financials

- Logical Grouping of the Business Requirements
- Focus on What Will Move the Business Forward the Fastest
- Spreading Out The Cost of the Project Over Time to Optimize Cash Outlay
- Scalability User Counts and Modules

Fast Track Benefits

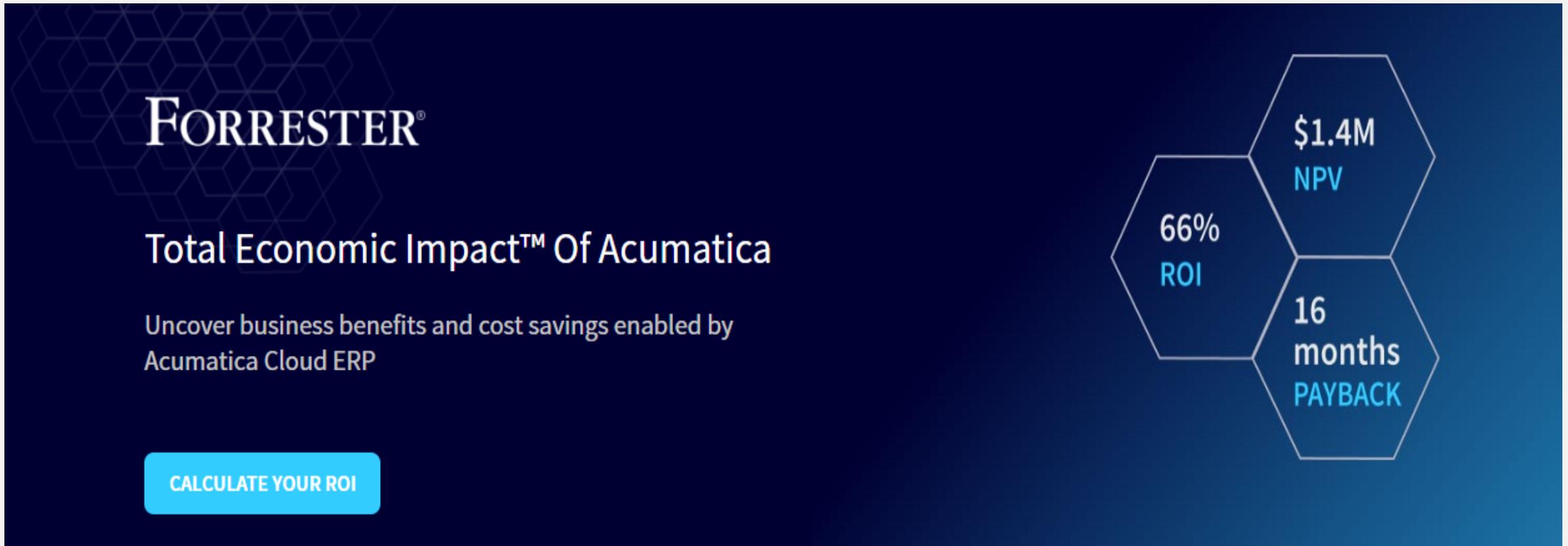


- Live Faster
- Accelerate Return On Investment (ROI)
- Fixed Cost
- Easy To Use and Learn

Guiding your project team for a successful deployment:

1. Foster open communications
2. Work toward a shared vision
3. Empower team members
4. Establish clear accountability and shared responsibility
5. Focus on delivering business value
6. Invest in quality
7. Learn from all experiences
8. Our team is here to help you; the ERP deployment is your project

Total Economic Impact™ Of Acumatica



FORRESTER[®]

Total Economic Impact™ Of Acumatica

Uncover business benefits and cost savings enabled by Acumatica Cloud ERP

[CALCULATE YOUR ROI](#)

66%
ROI

\$1.4M
NPV

16
months
PAYBACK

Customer Testimonial



“What really threw us over the top with Acumatica is that it offered a full quote-to-cash cycle and it overlaid on top of a solid of our accounting system. Acumatica offered a service package, purchasing, inventory, a Client Relationship Management (CRM), quoting, manages projects and sales orders - all right there in one Operating System. We were shocked to find all of this functionality in one system.”

*Derrick Elledge, VP of Operations & Co-Owner
Power Storage Solutions*

Read more here: <https://bit.ly/2Ttl8Bh>



Implementing Acumatica has allowed Power Storage to eliminate what Elledge estimates is some \$40,000 to \$50,000 in waste a month out of their systems from lost revenues to lost time trying to get the information they need out of so many different systems.

Q & A and Next Steps



If we have piqued your interest please reach out to us at info@cfbs-us.com or email Dan Ellicson at dellicson@cfbs-us.com. Dan will be pleased to get you the right resources to begin your evaluation of Acumatica.

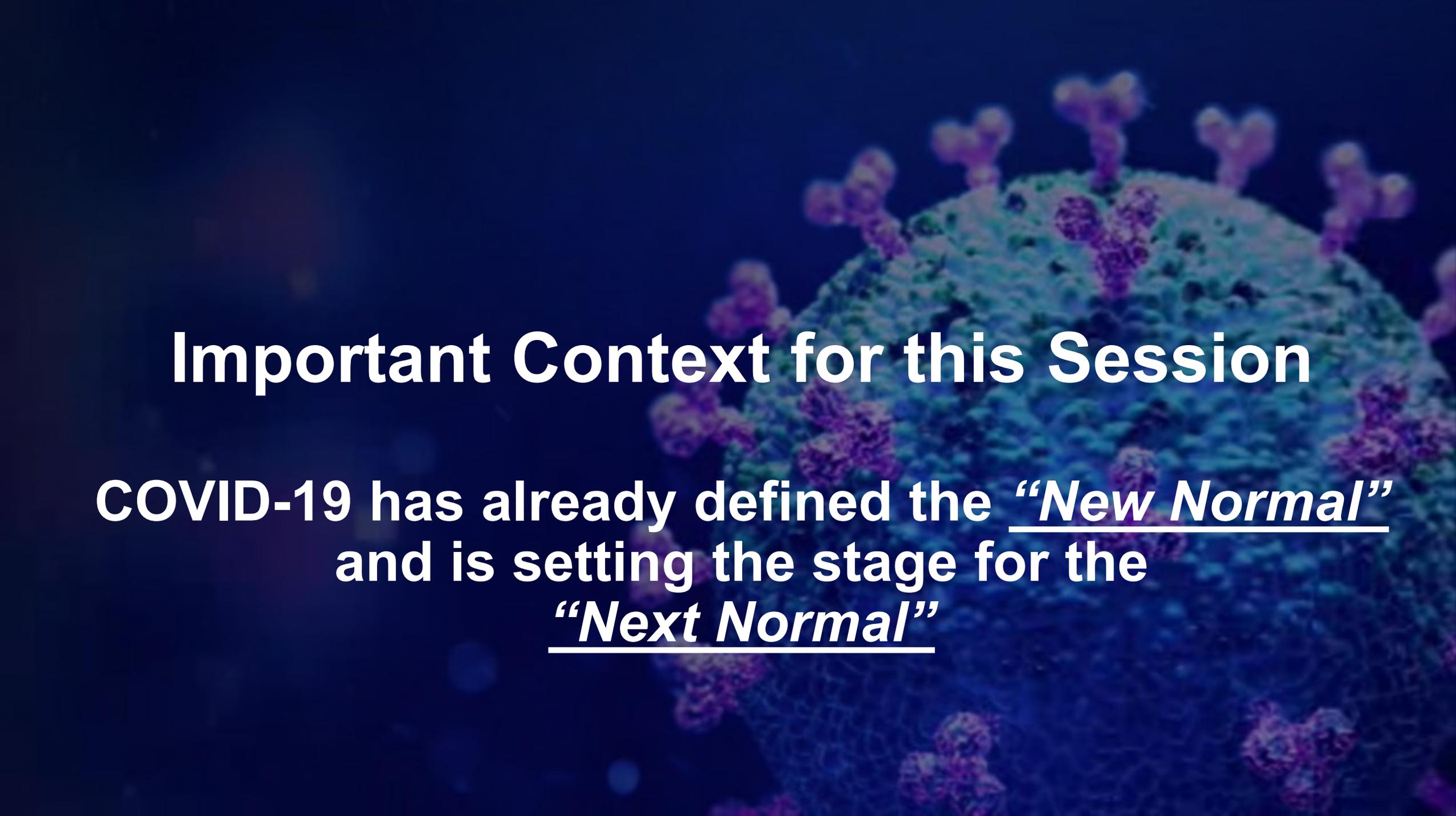
Visit our website at www.cfbs-us.com

Watch

Thank you for your time!



Gold Certified Partner



Important Context for this Session

COVID-19 has already defined the “New Normal”
and is setting the stage for the
“Next Normal”

Our World “was” Changing and COVID-19 will push it to Change even Faster

-Accelerating these “new” Customer Demands-Bob Anderson, Gartner Group

- Instant availability everywhere on anything
- Intelligent Embedded Technologies
- Digital Business Platform for launching new products/services
 - Harvard Business Review Article
 - Finding-the-platform-in-your-Product

- “Consumer-Level Simplicity”
- Access over ownership
- Extend and Integrate Seamlessly
- Improved Connections between People and Data
- Success Measured by Outcomes

What Customers and Partners need to do
to Stay Relevant

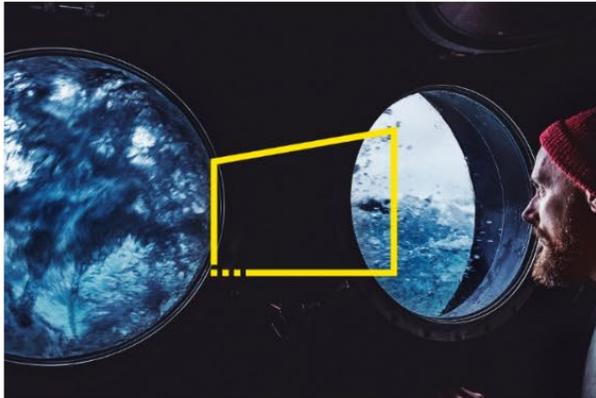
Innovation

- New Business Models
- Speed to Market
- Competitive Advantage

Efficiency

- Industry Best Practices
- Optimized Processes
- Lower Costs

Our latest thinking



How can your industry respond at the speed of COVID-19's impact?

Our regularly updated perspective on the pandemic's impact across nine industries, actions leaders should take and questions to push yo...

8 Apr 2020 | **Shaun Crawford**



Four ways to enable your workforce in remote-working environments

Learn how you should respond in the era of COVID-19 as your people face a big shift in behaviors and mindsets to sustain business operati...

8 Apr 2020 | **Maya Smallwood**



Enterprise resiliency: nine areas of focus for COVID-19 crisis management

Introducing an easy-to-use diagnostic tool to help provide a comprehensive approach to crisis management.

8 Apr 2020 | **Tonny Dekker**

11,686 views | Mar 26, 2020, 04:26pm EDT

How CIOs Should Reroute Digital Transformation In The COVID-19 Crisis



Vijay Gurbaxani Contributor

I study, write and speak about digital transformation.



Person in front of Tokyo Metro map AFP VIA GETTY IMAGES

“We’ve learned from prior downturns that there is a right way and a wrong way to go about rethinking investments.

The great danger right now is that CEOs adopt a blunt approach, asking all departments to take the same percentage cut in an attempt to be fair.

That’s the wrong way.

Technology, done right, enhances productivity and efficiency. Clearly, investing in these sorts of systems enables companies to do more with less. For starters, as businesses embrace work from home, investments in videoconferencing and collaboration software are essential.

Moreover, with so much uncertainty, it may even pay to accelerate, not just maintain, your investment in automating costly processes.”

McKinsey

New from McKinsey & Company



Building an e-commerce business: Lessons on moving fast

“While the full implications of COVID-19 are still unknown, it’s clear that the impact on retail is already significant. Emerging evidence points to a significant shift, as customers scale back their shopping in stores and instead go online.

In China, online shopping has increased 15 to 20 percentage points,¹ and e-commerce in Italy has increased 81 percent compared with the last week of February.² US consumers have largely followed the same pattern. The COVID-19 crisis is first and foremost a human tragedy, requiring companies to take immediate steps to protect their people. Amid this human cost, companies are also starting to come to terms with the impact of the crisis on their businesses. With offline shopping collapsing, companies’ strategies will need to focus on fortifying their web presence and, in some cases, building an online business. “

Channel Your Inner Entrepreneur

How Your Business Can Survive The COVID-19 Crisis (And Then Thrive After It)



≡ Entrepreneur

There is a popular meme circulating these days that asks:

“Who is responsible for your company’s digital transformation?”

A. CTO

B. CEO

C. COVID-19

As this meme shows, most entrepreneurs and businesses are struggling in the current environment, but every crisis offers opportunities, and this one is no different.

Cash is Everything

Focus on Growth and Innovation (3 types)

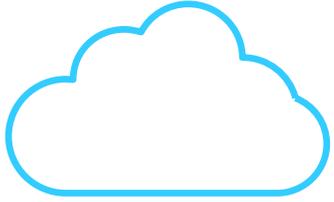
1. **Incremental Innovation** can be something as small as using what you currently have as products and services, and focusing on sectors that are doing well during this time.
2. **Sustaining Innovation** is around adding a product or a service that complements what you do, but is not part of your offering right now.
3. **Disruptive Innovation** is what most people refer to when they mention innovation. Such innovation usually turns your business upside down.

Not all innovation is technological– often, it is business model innovation.

Fundamentally, the change is about delivering value.

Summarizing the New Normal preparing for the Next Normal

- COVID-19 will have a **LASTING** impact on business... aka the **NEXT NORMAL**
- Enterprise **RESILIENCY** is Critical for you and your Customers
- The **DISTRIBUTED** and/or **REMOTE** workforce is here to Stay
- **E-COMMERCE** and an **ENHANCED WEB-PRESENCE** will accelerate even faster as in-person and/or “offline” engagements continue to collapse and evolve



The best path for transforming your business to thrive in the new digital economy

 **Acumatica**

The Cloud ERP

Connected Business. Delivered.

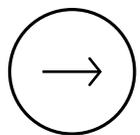




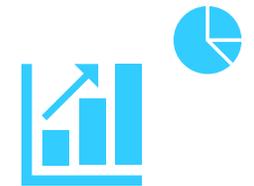
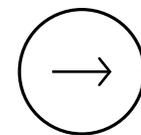
Digital transformation



**Analog
business**



**Modern
technology**



**Digital
business**

The Cloud ERP

For resilient business

Built for mobile and telework scenarios and easily integrated with the collaboration tools of your choice, Acumatica delivers flexibility, efficiency, and continuity of operations to growing small and midmarket organizations

Acumatica Cloud ERP provides the best business management solution for digitally resilient companies

	Connected business	Delivered
	Rapid integrations	Delivered
	Remote collaboration	Delivered
	Business resilience	Delivered
	Future proof	Delivered

**Acumatica named Best Cloud ERP
Solution, Best Manufacturing Solution,
Best ERP Software**

SIIA CODiE AWARDS



**Acumatica noted/ranked highest in
customer satisfaction and usability**

Gartner®



Why Customers and Partners are Choosing Acumatica

Access from anywhere on any device with Natural Language

Now with Alexa and Siri



Flexible deployment options



Public cloud

Acumatica Cloud

SaaS offering



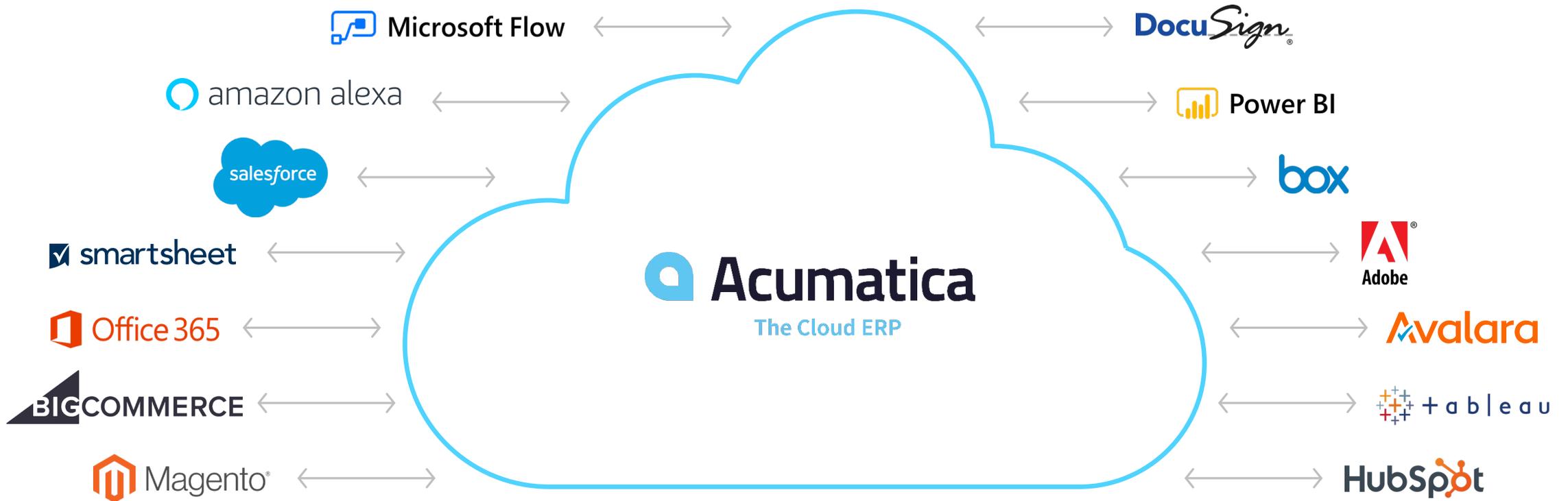
Private cloud

Acumatica Cloud

Server and database

Hosting or cloud provider

Enabling and Empowering the Connected Cloud !



Modern, growth-friendly licensing



Includes all employees,
not just a few



No per-user fees; extends
to key partners, customers



Removes business bottlenecks,
improves results

Scales as your business grows, based on the infrastructure you consume and can flex with seasonal requirements

Modern security

Enterprise-grade security features such as server side logic, detailed access controls, and robust multi-factor authentication are built in



Data ownership



Acumatica Summary

- Access from Anywhere at Anytime on Any Device
- Empowering the Connected Cloud
- Flexible Deployment Options
- Consumption Based Licensing-***not restricted to user count !***
- Analyst Approved Acumatica is a Safe, Stable and Growing Company