So You're Thinking About Changing Business Systems:

What to consider before making the change and how to make the change that's right for your organization.

Introduction

As CFO for a mid-sized distributor in central Pennsylvania, Melissa Lovrich had three key objectives:

- Increasing revenue
- Drive down costs
- Deliver excellent customer service

She ultimately found that achieving all this demanded way more than their current technology could provide. They had a paper-based system where Melissa would ask for information, but by the time she got it, it was so outdated it was nearly useless. To often she couldn't even get the information at all!

Does this sound familiar? Do you want to help your company grow, but are mired in inefficient processes? Is your company's performance outpacing what your business software can manage? Do you feel hampered because you can't make fully-informed decisions? If so, you know that a change is in order, but are unsure about what the next step should be.

In exploring the issues and solutions associated with business software, we'll be hearing more about Melissa's story — and other business decision-makers like her — as they eventually find the solution that gives them the confidence to take their businesses to new heights without having to worry about any technology roadblocks.

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"We've always had plenty of data. It was a matter of putting it in a form where it could be helpful to grow our business.
Greg Drew, President, Value Drug
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What's Keeping You Up at Night?

Yes, you know you need to run a lean and efficient business. But not having the right software to support you in that goal can leave you frustrated in the moment — and worried about the future.

Rest assured, you're not alone. In fact, there are some common reasons, that decision-makers suffer with sleepless nights:

Your software isn't helping your business grow...

- If you are working with old, outdated (maybe heavily customized) business software that has little, if any, support or upgrades available. When it "hiccups" there is a mad dash to find a solution. And you're worried that maybe the next time it hiccups it'll break altogether, leaving a dangerous gap in business continuity. The consequences of that would be too dire to bear thinking about.

- If you are running multiple business systems that don't "speak" to each other. Your key departments — sales, purchasing, accounting, and customer service — just aren't on the same page. If that's the case, then your staff is routinely entering and re-entering transactions into different software packages. Plus, your staff is pulling reports from different systems and can't compare data in real-time (not to mention, you're left wondering which numbers are the most current).

- If you've been using packaged software, like Quickbooks® or Peachtree®, and you keep hitting new walls because the software gets more limiting the more your company grows. The good news is business has been so good that you've outgrown that system and you need to move to something more powerful. The bad news is you are, understandably, overwhelmed with the options of what to replace it with and need guidance to help wade through these unfamiliar waters.

When decision-makers were in a similar situation…

Twelve years ago, Melissa was working with software that was nearly useless, "Our business system was very old. It was the old green and black screen. All it could do was basic data in, and data out. We ended up with stacks and stacks of paper that we had to sift through to find our answer and then key that into a separate spreadsheet. And after all that effort, we could only look at Cost of Goods Sold, and one or two other areas. That's when we decided to look around for something new."

You need to change technologies, but don't have anyone to turn to…

If your organization is like most small and mid-sized companies, then you simply do not have the internal bandwidth or specialized staff to implement a large-scale business software change.

Even if you have an outside resource for tech support, they probably don't have experience implementing a company-wide business system change. That means they lack the in-depth knowledge of the business technologies available, and can't recommend appropriate solutions, let alone a strategic path to evolving your business systems for your ultimate success.

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Be Aware!

There are multiple ways to deploy a new business system – on premises, in the cloud, or a combination of both. It is important to consider what your current infrastructure can accommodate and also what the pros and cons of each deployment option are. A trusted software partner can help make recommendations that fit your business.

When decision-makers were in a similar situation…

After speaking with dozens of business owners and executives from small and midsize companies, I've learned what matters most to them when choosing a business technology partner:

❖ Working with a company in their region. Chris, an IT director, explains why he feels this matters: "When I call them, I'm not getting someone on the west coast who doesn't care about our business. Our partner is so familiar with us, they often know what our questions are going to be before we ask them."

❖ Will make objective recommendations only *after* listening and learning about their unique business requirements.

❖ Understands how to customize and scale the software to keep pace with their growing business.

❖ Knows the latest technologies AND understands how it relates to the functional areas of their business. Greg Drew is president of a pharmaceutical distribution company and can relate: "I refer to our partner as our 'Home Team;' they coordinate everything in my best interest. One thing that's very helpful to me is that they take 'techy talk' and turn it into something that's meaningful to me."

❖ Provides a well defined implementation plan, that fits their business needs *and* budget.

Safety Tips
Before partnering with a software consultant…

✓ Once you've narrowed down your list of potential partners, be sure to check a minimum of three callable references. If they cannot provide this, then look elsewhere.

✓ Make sure the partner has a team in place that can drive the implementation. They should have a dedicated Project Manager that keeps everyone on track and on schedule.

Making the Change

If you're reading this, that means you're considering moving away from your existing business software. But you're probably feeling overwhelmed — too many options, too many decisions; knowing full well the consequences for making the wrong decisions could cripple your business. These thoughts have kept you from making the leap— and also keep you up at night.

If anything about that scenario feels familiar, take heart. Other companies like yours have been through that ordeal, and have come out the other side shining.

Chris Pechtold, Director of IT, recalled, "Feeling anxiety is normal when you're facing a major software change — worrying about all the possible business disruptions. But those were all minimized by our software partner being here, understanding our business, our concerns, and being with us every step of the way. One of my big concerns was that things break. That's reality in IT; nothing is infallible. But when things have broken, no matter what time of day it was — it may have been two in the morning — I had our software partner on the phone helping us correct the issue."

Change…a good thing!

Phil Sukenik, VP of HR, now knows that change equals opportunity. "Our partner has been pivotal in helping us quickly overcome any challenges we've had because of rapid changes in technologies. In fact, they have helped us face changes in both technology and business environments — and we look forward to continuing to work with them to face new challenges as well."

The Opportunities Ahead…

Given all of the questions and issues you're facing, you might think that the search for a solution will be arduous and costly, and that finding a trusted partner who can help you through it all is impossible.

It is possible—all of the companies you've been hearing from were in the same boat. They all eventually took the leap to invest in the technology they needed to grow their business. They sat down while their now current partner learn about them, their businesses, and what they needed to truly succeed.

And because of that, they implemented the correct system and have experienced increased sales and profits, and have more efficient back office processes. Whenever there have been hiccups along the way, their partner was there to see them through it. Their decision-makers now have the information they need at their fingertips — and a true partner who remains with them to help their company grow.

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We are poised for growth because we have no barriers to increased sales and profits — no barriers in what our system can help us accomplish. We now have streamlined, automated processes and a system that instantly delivers easy-to-understand data. We can make fully-informed decisions that increase our profits and grow our business.

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Acknowledgments

We'd like to thank the customers quoted in this book, and for their generosity in sharing their stories. Here their stories in their own words by visiting **www.em-powered.com/customer-stories**.

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