Using modern business applications to differentiate your business

November 12
Welcome!  
Important Web Seminar Notes

- To view the slides in full-screen, press F5 on your keyboard; press Escape to return to the webcast menu
- To ask a question during the meeting, launch the Q&A Manager located on the toolbar at the top of your screen
- To download a copy of today’s presentation, click on the Handouts icon located on the toolbar at the top of your screen  
  - The presentation and link to the event recording will be sent to all participants following the event
- Today’s presentation will be recorded
What is your industry classification?

- Manufacturing
- Distribution
- Retail
- Health Care
- Not-for-Profit
- Professional Services
- Other

Polls are open.

[ Poll 1 ]
Today’s Presenter

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Today’s Presenter
Agenda

- Now Generation
- Business applications
- The classic problems
  - Lack of access to information
  - Inefficient processes
  - Unique requirement
- The Now Generation solutions
  - Web and mobile application delivery
  - Now generation integration
  - Point and click customization
- 5 things you should not be doing today
Now Generation

Here & Now
What do we mean by “Now Generation”?

- Available today
- Designed for the way people work today
- Designed for a web and mobile connected world
- Not:
  - The future of applications
  - Something just in the lab
  - Something a software vendor is “working on”
  - The product roadmap
  - Teleportation
Business Applications
Core areas

Business Applications Spectrum

Core Business Functions
- Sales and Marketing
- Operations
- Finance
- Human Resources
- IT

Core Application Portfolio
- CRM
- ERP
- HRIS

Vendor Landscape
- Industry Specific Solutions
  - Professional Services (PSA)
  - Manufacturing Focus (Warehousing)
  - Non-Profit (Grant Management Focus)

- Advanced functionality/Add-ons
  - Marketing automation
  - CPM (budgeting/forecasting)
  - Advanced procurement
  - ECommerce

All businesses have the same core functions and core application requirements. Selection and deployment of the appropriate application mix varies greatly by industry and organization size.
Business process

Business Applications address the major work streams

**Lead to Cash**
- Marketing
- Sales
- Order Management
- Fulfill/Invoice
- Track and Collect

**Procure to Pay**
- Requisition
- Approval
- Purchase Order
- Receipt
- Match/Pay

**Plan to Report**
- Budget
- Record
- Report
- Forecast

**Deploy to Dispose**
- Deliver
- Install
- Maintain
- Repair
- Dispose

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The classic problems
IT and Business applications still need work in most organizations

Figure 4. Effectiveness of IT systems

<table>
<thead>
<tr>
<th>Category</th>
<th>1 = Not effective</th>
<th>2 = Neutral</th>
<th>3 = Neutral</th>
<th>4 = Extremely effective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Share information within the company</td>
<td>3%</td>
<td>15%</td>
<td>31%</td>
<td>40%</td>
</tr>
<tr>
<td>Share information with customers</td>
<td>10%</td>
<td>22%</td>
<td>35%</td>
<td>24%</td>
</tr>
<tr>
<td>Share information with suppliers</td>
<td>13%</td>
<td>26%</td>
<td>33%</td>
<td>19%</td>
</tr>
<tr>
<td>Improve company productivity and reduce costs</td>
<td>5%</td>
<td>20%</td>
<td>42%</td>
<td>27%</td>
</tr>
<tr>
<td>Improve customer satisfaction</td>
<td>8%</td>
<td>19%</td>
<td>37%</td>
<td>30%</td>
</tr>
<tr>
<td>Enhance corporate security and reduce risks</td>
<td>12%</td>
<td>20%</td>
<td>42%</td>
<td>22%</td>
</tr>
<tr>
<td>Improve profit margin</td>
<td>7%</td>
<td>29%</td>
<td>40%</td>
<td>19%</td>
</tr>
<tr>
<td>Minimize corporate risk</td>
<td>12%</td>
<td>25%</td>
<td>40%</td>
<td>19%</td>
</tr>
<tr>
<td>Increase revenue</td>
<td>15%</td>
<td>31%</td>
<td>38%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Source: 2014 McGladrey Monitor Report
The classic problems in business applications

1. Lack of access to information
   - Can’t even get connected to system
   - Need to learn complex application to access one view of information needed
   - Can’t filter, sort, and search to get right information
   - User must rely on administrators to build reports
   - Disparate systems require combining many sources of data to get useful reports
The classic problems in business applications

2. Inefficient processes

- Systems designed around Task, not Process
- Lack of workflow tools
- Disparate systems require re-entry of data
- No end-to-end visibility
The classic problems in business applications

3. Unique requirements

- Few organizations can or should create their own business applications yet nearly all have some unique requirements
- Leads to proliferation of systems
- Reliance on Excel and homegrown databases
- Unique data that differentiates your business not integrated to core business data for reporting
Which of the classic problems is your organization experiencing?

Polls are open.

- Lack of access to information
- Inefficient processes
- Unique requirements
- All of the above
- None of the above
- Don't know

[ Poll 2 ]
Today’s needs, yesterday’s solutions

1980s Enterprise Resource Planning (ERP) architecture still deployed today

- Intertwined spaghetti code and parameters
- Duplicated data structures
- Middleware and batch processes

The result: Complexity and inflexibility

- Functionality in separate applications
- Business intelligence (BI) an afterthought
- Task-oriented user experience

Today’s needs, yesterday’s solutions
The now generation solutions
The now solutions to lack of access

Now Generation applications provide access:

- Access from any internet-connected device
  - Laptop, tablet, phone
- Personalized interfaces provide data by role
- Built-in, simple query tools
- Non-technical report building experience
- More comprehensive applications provide a single data model over broader work streams
The now solutions to lack of access

**Mobility**
- Distributed workforce, outsourcing, contingent workers, any device

**Self-Service**
- Submit web based time and expenses and purchase requests via the web
- Self-serve customers, vendors, partners

**Visibility from Anywhere**
- Real-time role based dashboards,
- Self-service reporting and analytics
- Personalized

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The now solutions to lack of access
The now solutions to lack of access

Access through browser

Full range of data for role

End user ability to create and modify reports

The now solutions to lack of access
The now solutions to lack of access

Access through browser

Full range of data for role

End user ability to add and remove reports

The now solutions to lack of access
Mobile View of Customer Relationships

Microsoft Dynamics CRM

Accounts
Appointments
Campaigns
Cases
Contacts
Email Messages
Leads
Letters

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The now solutions to inefficient processes

Now Generation applications make business processes more efficient:
- Processes, not just tasks, can be defined, managed, and measured
- Workflow is visual rather than in code
- Broader capabilities reduce the need for re-entry
- Web Services APIs support efficient, flexible integration between systems where necessary
The now solutions to inefficient processes

Drag-and-drop tools allow customization of process

Graphical interface visualizes process from start to finish

The now solutions to inefficient processes
Workflow managed by the business, not IT
The now solutions to inefficient processes

Process defined and embedded in application

Current status indicated

Others involved in process

The now solutions to inefficient processes
The now solutions to inefficient processes

Workflow provides role-specific, actionable information. In this example, a Warehouse Manager sees the status and volumes of several processes with links to take action.

The now solutions to inefficient processes
The now solutions to inefficient processes

A CFO has a broader view and receives his workflow tasks along with Key Performance Indicators.
The now solutions to unique requirements

Now Generation applications are highly configurable to add fields and forms:

- Current tools give ability to address unique requirements within the application rather than building a separate application
- Reporting tools have same access to custom fields and forms as standard data
- Custom information is connected to standard business information
The now solutions to unique requirements
The now solutions to unique requirements

All the aspects of this new type of information are defined in using simple screens
These two versions of customer maintenance allow different users to work with the same data in different ways.
The now generation solutions

Now Generation business applications
- Access on various devices over the internet
- Processes defined and managed within the system
- Extensible to support unique requirements
The now generation of applications that work for you, not against you

- Applications that are an asset
- Agility in deployment
- Complete industry-specific solutions
  - Manufacturing
  - Distribution
  - Retail
  - Services
  - Public Sector
- Powerful embedded analytics and BI

Works the way you need it to
Simple to use
Tailored to meet your needs
Get the right data to decision makers

The now generation of applications that work for you, not against you
Which business tool would you like to see included in your business application?

Polls are open.

- Social media
- Mobility
- Business Intelligence
- Workflow
- All of the above
- None of the above

[ Poll 3 ]
Five things you should not be doing today

Five things you should not be doing today
Five things you should not be doing today

- Storing enterprise data in Excel
- Typing data from one system into another
- Wondering if your data is backed up
- Driving to the office to get information
- Waiting for an administrator to create reports
Five things you should be doing today

1. Identifying key drivers of your business and measuring and managing to these drivers
2. Putting information in the hands of decision makers real-time
3. Maintaining a single “version of the truth”
4. Have consistent, reliable information across the organization
5. Keeping things simple
Are you planning a move to a now-generation business application?

Polls are open.

- Yes, within six months
- Yes, between six months to one year
- Yes, more than a year
- No plans
- Don't know

[ Poll 4 ]
Submit questions via the Q&A feature. Simply select the Q&A window, type your question into the dialog box, and click the “Ask” button.

The slides and recording of this call will be sent to attendees for today’s program.
Learn how new technology platforms can change how you do business

- Now-generation business application series continues
  - Mobility for enhanced productivity on Nov 13
  - Actionable data on Nov 17
  - Collaboration in the cloud on Nov 18
  - Automating exception management on Nov 20
- Register at www.mcgladrey.com/events

Learn how new technology platforms can change how you do business
Thank you for attending

- The presentation slides and a link to the call recording will be sent to all participants within a few days of the webinar

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