



The Top 10 Signs You've Outgrown QuickBooks

– And What to Do When You Have

Beginning now...



Presented by Blytheco

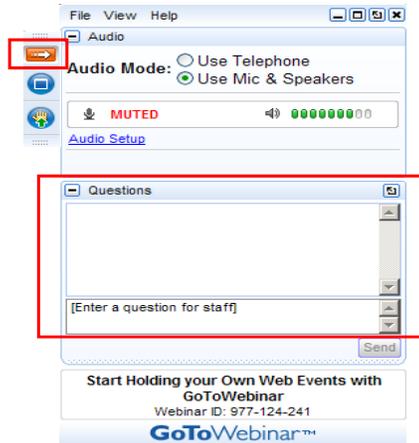
Welcome!



Today's Agenda

- Introduction
- The Top 10 Signs You've Outgrown QuickBooks
- And What to Do When You Have
- Q&A

How to Participate Today



- ➊ Arrow = Open/close your panel
- ➋ Questions = Submit text questions
- ➌ Follow-up email with video link

Audience Poll...



Do you feel your company is outgrowing QuickBooks?

- ➊ Yes, definitely
- ➋ We think it's very likely
- ➌ Maybe—we'd like to know more
- ➍ Not sure
- ➎ No, just curious

Our Panel



Charles S. Rogers

- Solutions Architect, Blytheco
- A veteran of the software industry with over 25 years of experience as an end-user, consultant, a nationally recognized certified trainer, and Solutions Architect.



Shonnie Brinagh

- Business Solutions Manager, Blytheco
- Partners with small, mid-market and enterprise businesses through their software selection process all the way through implementation. Shonnie previously worked as an Inside Sales Consultant for Sage.

Our Panel



Alicia Anderson

- Manager, Business Solutions Experience, Blytheco
- Alicia has consulted with hundreds of businesses, helping them with scoping, identifying and budgeting for a variety of software solutions. She has more than 20 years of experience in software consulting.



The Top 10 Signs You've Outgrown QuickBooks

– And What to Do When You Have

Sign #1: Need More Than Simple Accounting



- ③ You want more than simple accounting; you need deeper insight for better, faster decision making
 - ③ Improved reporting
 - ③ Key performance indicators (KPIs)
 - ③ Business analytics

Sign #2: Important Data Trapped in Information Silos



- You have a growing number of information silos due to different software
 - Can Sales access inventory info?
 - Do your financial people need to use multiple software solutions or spreadsheets to do their jobs?

Sign #3: Want to Grow Sales with CRM



- You want a CRM module to improve customer relationships and grow sales
 - CRM software can increase sales by up to 29% and sales productivity by up to 34%, according to Salesforce.com
 - CRM software had the biggest impact on customer retention rates and customer satisfaction rates, according to a recent survey by software site Capterra.

Sign #4: Need Better Inventory Management



- ③ You need the ability to track inventory using specific valuation methods
 - ③ Lot
 - ③ Serial
 - ③ Fixed Transfer Price (FTP)
 - ③ Mov. Aver. Unit Cost (MAUC)

Sign #5: Need Better Sales Forecasting and Budgeting



- ③ Sales forecasting and budgeting processes rely on guesswork
 - ③ Sales forecasting accuracy can be improved by up to 42% with CRM
 - ③ Using Excel spreadsheets for budgeting and then loading budget into QuickBooks

Sign #6: Not Meeting Compliance Requirements



- ③ Industry compliance not possible with QuickBooks
 - ③ GAAP compliance
 - ③ Require a solid audit trail
 - ③ Require security that cannot be manipulated after period close
 - ③ Ability to store documents to improve compliance
 - ③ Ability to graphically map processes via process flow charts

Sign #7 Your Industry's Specific Requirements Not Met



- ③ You need industry specific capabilities
 - ③ e-Commerce Platforms
 - ③ Advanced Warehouse Management
 - ③ Human Resources Management (HRMS)
 - ③ Project Accounting

Sign #8: Need More Sophisticated Data Processing



- ③ You need more sophisticated data processing capabilities such as batch processing
 - ③ Allow for registers to be reviewed, audited and adjustment, prior to sub-ledger update
 - ③ Allow sub/detail ledger to be updated separately from general ledger update
 - ③ Better workflow platform for entering larger amounts of data

Sign #9: You Need Better Financial Visibility for Planning



- ③ You're having difficulty getting the right data to make business decisions
 - ③ Increased data visibility
 - ③ 'Slice and Dice' data analysis
 - ③ Quick and powerful ad-hoc reporting
 - ③ Graphically present data analysis
 - ③ Build advanced financials across multiple business units and even multiple company entities

Sign #10: You Need True Manufacturing Software



- ③ Your Manufacturing Processes Need Support
 - ③ Stand-Alone Bill of Material (BOM) module
 - ③ Work Order Module
 - ③ Routing
 - ③ Work In Process (WIP) management
 - ③ Integrated resource forecasting solutions

Sign #11: Cookie Cutter Isn't Cutting It



- ③ You need to be able to customize
 - ③ Define fields as your users need them
 - ③ Define tables & scripting to meet your needs
 - ③ Set field validation as required by your company and industry
 - ③ Assign security at field level to meet your organization's needs

What Do You Do Now?



- ③ Understand your company's needs to insure you get what you need
 - ③ Make a plan
 - ③ Scope out your project
 - ③ What do you need?
 - ③ Gather input from all stakeholders
 - ③ Define your budget
 - ③ Build the business case

What Do You Do Now?



- ③ Get expert help
 - ③ The right consultant will:
 - ③ Help you define your needs/goals
 - ③ Understand where your current software is falling short
 - ③ Provide you with options—not just one choice
- ③ Look for experience

Q & A

Please type your questions into the Questions Pane on your GoToMeeting Dashboard.



Next Steps?



- ➊ Get a free 2-hour consultation
 - ➋ You can get two hours with one of our consultants!
- ➌ Want more info? Try our free “Which ERP is Right for Your Business?” quiz
- ➍ Questions? 949.583.9500, x2500 or solutions@blytheco.com

