5 Ways to Transform your Business using SyteLine ERP

Ron Clontz – VP Godlan Inc.
Introductions

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Experience:

- 22 Years in Manufacturing and Finance
- 20 years with SyteLine / Symix / Syman
- B.S.B.A – Accounting
- CPA Firm – 2 years Audit and Tax
Transforming Your Business using SyteLine ERP

- Utilize technology as competitive weapon
- Go Green and save big $
- Visibility into sales pipelines and forecasts
- Eliminate those black holes and non-integrated solutions.
- Implement lean best practices that embrace technology

“To alter, change radically the form or function”
Technology as Competitive Weapon

- Every company is a little different as some compete on price, delivery, service, or projects
  - Price requires good cost information
  - Delivery requires stock status and or capacity status
  - Service requires great tools in the hands of those touching customers
  - Projects require cross functional teams to work as one to be successful
- Information can be a difference maker!
  - Which customer orders are going to make money?
- Great service requires electronic communication
  - Emil notification of shipments and trackers
  - Portals for customers to look up information
The new SyteLine was built to be your competitive weapon

- Microsoft .net
- Just like using excel
- No more custom reports
- No more costly modifications
- Communication built right in
  - Email
  - Fax
  - Sharepoint
Microsoft recently announced they will be discontinuing support for Windows Server 2000 effective July 13, 2010.
Go Green and Save Big $

- The average cost of processing a business document is over $20 per transaction. - Kevin Crane, ‘Designing a document strategy’

- Professionals spend 50% of their time looking for information. (Source: PWC)

- 90% of corporate memory exists on paper. (Source: Coopers & Lybrand)

- The average cost to fill and maintain a single 4 drawer file cabinet is over $6,200 per year. (Source: Coopers & Lybrand)

The average document gets copied 19 times. (Source: Coopers & Lybrand)
Go Green and Save Big $n

- The new SyteLine was built to be green
- Scanning capability for all incoming hardcopies
- Email attachments to outlook
- Auto archives all printed doc’s like
  - Invoices
  - Purchase Orders
  - Order Verifications
  - Quotes
- Search and view / email any document quickly
Most companies still maintain their critical customer and prospect data in excel and outlook as emails stored with their salespeople.

Critical activities and milestones are commonly not tracked nor associated with revenue forecasts.

Quotes are the most common way to see what business is coming your way.

The true revenue opportunity with prospects and customers is not easily determined.

Knowing which opportunities generated quotes and orders is not possible.
Visibility into Sales Pipelines and Forecasts

- The new SyteLine was built to help you track your sales teams
- Opportunities
- Pipelines
- Communications
  - Phone calls
  - Emails
  - Documents / drawings
- Activities planned and completed
- Full 360 degree account visibility and history
Eliminate Those Black Holes

“Place where key information is tracked but is not visible or accessible”
Eliminate those black holes and non-integrated solutions

- Your software is at minimum 10 years old and limited due to technology
- This creates black holes and disconnects all thru your processes
- Symptoms are:
  - Separate CRM systems
  - Excel as main reporting and data repository
  - No document scanning or archival capability
  - Separate workflow systems
  - No integration to CAD systems
  - No logistics capabilities e.g. export docs, shipment tracking
  - Separate quality systems
  - Separate data warehouse
Eliminate those black holes and non-integrated solutions

The new SyteLine was built to help you eliminate those black holes and other applications:

- Built In CRM
- Built In Email
- Built in Terminal Services
- Built in Document Management
- Built in Report Writer
- Built in CAD interface
- Built in Sharepoint interface
- Built in Excel / Word interface
- Built in upgrade capability
Implement lean best practices that embrace technology

- Best way to enhance your project and ensure the ROI
- Value stream mapping is one option done by our newly formed lean team
  - 20yr Lean Blackbelt
- Our two day workshop includes:
  - Document current processes
  - Identify waste in the process
  - Train on the Lean concepts and tools
  - Develop ideas for reducing/eliminating this waste
  - Train client personnel on this process
So where do you go from here?

- **Option 1 - Do Nothing**
  - Pro’s / Cons

- **Option 2 – Move Forward**
  - Reinstate Maintenance
  - Take advantage of special program

- **Example – 25 user system, $25k Maintenance exp 5 yrs ago**
<table>
<thead>
<tr>
<th>Reinstatement</th>
<th>vs.</th>
<th>Special Program</th>
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<tbody>
<tr>
<td><strong>25 user system</strong></td>
<td><strong>25 user system</strong></td>
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<tr>
<td>- $25k Maintenance</td>
<td>- $10k Maintenance</td>
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<tr>
<td>- $75k upfront to get back on and current</td>
<td>- $2k a month finance payment – 24months</td>
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<td>- $6k SQL Licenses</td>
<td>- Services as you go</td>
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<td>- Services as you go</td>
<td>- Data Conversion bundled</td>
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<td>- Hardware or Hosted</td>
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Net30: Economic Imbalance

Rate of Investment > Rate of Return

Software Goes Live

Cash Investment

- Software Net30,
- Hardware Net30,
- Professional Services (T&M)

Value Received

- Realized Process Improvements,
- New Revenues,
- Cost Savings,
  (value normally lags payment)

Economic Return Life Cycle

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ECONOMIC BUSINESS ALIGNMENT

Rate of Return > Rate of Investment

User deployment, etc.

Implementation Period
Zero Cash Outlay

Payment Begins

Revenues
Cost Savings
Investment – CASH FLOW

Earn Back Period

Net30

Time

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