

QUARTER

03

July 2009

QUARTERLY-
NEWSLETTER
FOR OUR SAGE
CUSTOMERS

The Advisor

Missed Renewing Your Maintenance Within the Last Two Years?

Realizing that you want the coverage from a ClientCare maintenance plan but didn't renew this year (or maybe last year)?

Sage is doing you a favor and reducing the reinstatement fees if you reinstate before September 28th. The more support you pre-purchase, the more savings you get:

- Save 100% on reinstatement fees with the purchase of a 3-year ClientCare plan.
- Save 75% on reinstatement fees with the purchase of a 2-year ClientCare plan.
- Save 50% on reinstatement fees with the purchase of a 1-year ClientCare plan.

Want to learn more? Contact Gilbert & Associates at 206.285.4348 for more information.



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Everyone is Atwitter for Twitter

There is no escaping Twitter these days. I can't even tell you the number of webcasts, seminars, and newsletters I have read on the value of Twitter for businesses lately. Let's face it, the popularity of social media tools has grown immensely in the past year. I have never been big on Twitter and I am still not convinced that Twitter is going to bring in qualified prospects for companies like Gilbert & Associates, traditional business to business firms with a mature demographic client. Although I am convinced that Twitter is a great way for companies to build trust, transparency, and meaningful relationships with clients and prospects.

Perhaps it shouldn't be assumed that every reader of this article knows about Twitter. In the simplest of terms, Twitter is a free service that allows you to speak freely to anybody in 140 characters or less. You can consider it a kind of micro-blogging that includes the ability to subscribe to, share, or follow tens, hundreds, or even thousands of other Twitter users.

Tweeting- posting on Twitter- can take a variety of

forms; some people use Twitter like an instant messaging program to tell the world what they had for lunch, to share a haiku, or rave about a particular blog they read. Others use it as a way to network and communicate with contacts, and share ideas, solutions or projects.

Part of the hesitation for Gilbert & Associates to join stems from my experience with other companies' tweeting. Some companies and business models have a natural fit with Twitter. Companies that serve a young, technologically savvy market will likely see encouraging results after investing time in Twitter. Companies who have been looking for an alternative way to engage customers, and provide quick, easy customer service have also found success on Twitter.

How about for companies such as Gilbert & Associates serving a traditional mid-sized business market? Is Twitter really the way to reach people and gain new business? My guess (and Hub's guess) was that the majority of our clients and prospects are not

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30%-off Sage Pro ERP for New Customers

Sage is making it easy for you to get into a powerful ERP system with 30%-off user licenses and modules until August 31st. If you miss the August deadline, Sage is offering 20%-off until September 28th. But don't delay, the savings end September 29th!

*Save 35% when ordering by 8/31/09 and 20 percent from 9/1/09 to 9/28/09. All new modules and LanPak purchases must include a one-year Software Assurance plan calculated at 18 percent of full SRP on the products purchased. May not be combined with any other offer or promotion. Offer may be changed or discontinued at anytime. Offer completely expires on 9/28/09.



Survival 101

What are you doing to survive this economy?

In my normal day-to-day operations, I have an opportunity to speak candidly with over 100 customers of Gilbert & Associates. Lately I've been working a simple question into my conversations with our clients, "How's business?" Overall, the responses have been surprisingly positive. That doesn't mean that our clients are all doing well. It means that even if they are not, they have a positive attitude about the future of their company, and are taking steps to make sure they protect what they have worked so hard to build.

Key to this is the use of their information systems. Whether or not it's a good thing or a bad, some business owners find themselves with way too much time on their hands. The phone isn't ringing, production or sales is slow, or employees just aren't finding enough work to fill their time (it's usually the reverse).

I thought I'd share with you some of examples of how some of the clients of Gilbert & Associates are using these strange economic times to change process.

- One of our customers has been trying for years to institute a training program for new employees. When a new accounting system is installed, typically there is formal training for all the employees working at the company at that time. After that, any new employee hired is likely trained by one of the people in the company, but they don't have the benefit the other employees had. So this company has rented a training facility, and is bringing in Gilbert & Associates to retrain the entire staff not only in Sage Pro, but in other office applications as well. We will be incorporating their company

process into our training as well.

- Another company is taking the time to clean up their data, and mine it for lost opportunities. They are developing new quoting and follow-up procedures. As we all know, quotes for products or services satisfy the prospect or customer's request for information at that moment, but time or lack of process doesn't allow us or dictate that we continually follow up on those quotes. They expect to benefit from these new systems immediately and for a long time to come.

- Yet another client is finally moving forward with a project they have planned for many years. This retail customer is currently relying on too many manual or antiquated procedures for their warehouse, purchasing and point of sale processes. They are now taking advantage of special pricing by the software and hardware vendors to implement a fully-integrated point of sale system costing well over half a million dollars. They expect the return on investment to take less than 12 months, and simultaneously satisfy customers, employees and ownership.

- Our final example is a company who has long talked of integrating their website with their accounting system. Their marketing efforts direct their prospects to their website for product information and samples. This results in a very tedious process to manually enter and fulfill the order. We have finally automated this process, resulting in faster fulfillment, better accuracy, and streamlined process. The recent departure of one of their personnel meant that position could remain unfilled because of this new automation.

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Meet the Newest Team Member: Jimmy

We are excited to introduce a new member of our team to you. Jimmy Sy-Quia is our new Microsoft Dynamics NAV consultant. It is nice to finally have all of our offices filled and a full team eager to help and dedicated to your success. Jimmy offers a new perspective and depth to the Gilbert & Associates team; he is our first Microsoft Dynamics NAV manufacturing specialist wholly devoted to that particular product.



Jimmy grew up in the Philippines, spending summers visiting family in the US. After completion of his undergraduate studies, he worked for one of the oldest property developers in Asia during the work week and as a jungle guide on the weekends. Eventually, he felt it was time to move on to his graduate studies, moving to New York to pursue his MBA in Finance and Marketing, leaving his then girlfriend a one-way ticket to New York in case she wanted to come along.

She took him up on his offer and moved to New York shortly after him, taking a job working at the United Nations. She was working there on 9/11 and soon after that, they decided it was time to move on from life in New York. After completion of his MBA, Jimmy worked as a financial analyst for a jeweler in the Washington DC area. This job served as his introduction to the world of accounting systems.

The background in finance, experience with accounting systems, and love for computers helped land him a job with one of the big Microsoft Value Added Resel-

lers. His NAV skills and manufacturing focus developed over the next five years as he took on projects with manufacturing clients from across the country.

Eventually, the time came for Jimmy to move on and coincidentally Hub was looking for a NAV specialist with a manufacturing focus. Jimmy seemed like a great fit. After interviews and a few trips to Seattle, Jimmy felt Gilbert & Associates would be a great fit for him too. "Hub's focus on the soft

skills during the interview caught me off guard," said Jimmy, "Most companies claim to be built on honesty and integrity, but you don't see it come out in daily tasks. Hub actually asked me how I defined integrity in my interview."

Gilbert & Associates' focus on the customer was refreshing for Jimmy. "Honesty and integrity are important for the healthy client-consultant relationship that you need to foster and grow. You are there to help grow the client's business and establish a productive environment for both the client and you; I found that through my visits with Gilbert & Associates."

It didn't take much to convince his wife and kids (Martin, 6 and Elise, 11 months) about the relocation to Seattle. One trip and they were convinced that the outdoorsy lifestyle of the Northwest would make it an easy transition for their active family. Oh and Jimmy's love for coffee made the transition easy as well. His drink of choice? A doppio (double shot of espresso) with a bit of sugar.

Business Management Software Usage in Mid-Market Companies



Gilbert & Associates' exclusive research helps companies understand

trends associated with business software investment strategies at similar companies.

Are your systems helping you out perform your competitors?

Are other companies considering new software? Do their systems provide information necessary to make informed decisions? Do they need better inventory management or demand forecasting capabilities?

This edition of our survey suggests that while companies are generally content with the back-office software, many are experiencing the challenges of entry-level and non-integrated systems.

See our full Summer 2009 report by clicking on the survey icon on our homepage at www.GilbertAssociates.com.



Twitter, cont'd from page 1

engaging in the Twitter world on the professional level; we found this to be true. Could we find qualified prospects find on Twitter? Sure, it's possible. The task is finding them, engaging in conversation, and building a trusting relationship with them through spurts of conversation in 140 characters or less while continuing the traditional marketing methods for the rest of our client base.

This is the hard part of Twitter; it's more than just getting on Twitter, creating a profile, and putting out a Tweet. Successful tweeting (bringing in business through tweets) requires a time investment that not many companies have right now, an investment for more than just the marketing department. It is easy to tweet about random happenings at the office, which tends to provide your followers with a personal connection to your company. However, if you don't give them something relevant, Twitter becomes nothing more than just another way to hold that water-cooler conversation. Relevancy can be achieved by engaging people from various parts of your organization, finding out what information customers are looking for, topics that interest them, and providing information to fit this need.

Providing relevant, timely information, links to other articles, white papers, etc. can help take the relationship with prospects beyond surface level. The combination of personal tweets and tweets referring followers to blogs, tips and tricks and promotions goes

beyond the transparency of the water-cooler conversation (an important part to a tweeting strategy) and helps develop a trusting and relevant relationship. In addition to ranting and raving about resources found on various online sites, you can provide links to content on your own site. This is of course, assuming you have the relevant content posted on your site, and that you have compelling information and enticing offers to keep them interested. Beware there is a fine line between sharing a promotion that your followers may find interesting and spamming your followers to the point of actually hurting that relationship.

It will take quite the tweet to earn business off of 140 characters or less, but the combination of conversational tweets and tweets providing relevant information can help build a trusting relationship with current customers and prospects, that can provide a return on investment. Think of Twitter as an additional layer of engagement with your customers and prospects. Just remember, the work isn't done when you submit your tweet to cyberspace, tweeting is just one layer of an integrated marketing approach to drive business.

Note: Regarding our success on Twitter, we are connected to other partners, vendors, resellers, industry leaders, and a handful of customers. By no means is our approach perfect or even near perfect. We regard Twitter as a learning experience, an experiment and a way for us to stay connected to our customers, prospects and vendors. We encourage you to give it a try, and consider how it may or may not be beneficial to your company. If you would like to add us, our username is GilbertERP.

It's more than just getting on Twitter, creating a profile, and putting out a Tweet.

Off Maintenance for More Than 2 Years but Want to Upgrade?

Sage is making it a little easier on your pocketbook to upgrade to the latest version of Sage Pro. Get 30%-off upgrade prices on users and modules for Sage Pro v.7.5 when you upgrade before August 31st. Or if you find that you can't upgrade until September, that's ok, you'll still get 20%-off until September 29th, when the offer completely expires.

Past Tips & Tricks

Did you know that all of our past Tips & Tricks and newsletters are archived on our website?

Go to www.GilbertAssociates.com/doc.htm for the full list!

Provide a Referral, Get a Reward

Do you know of a company that is struggling with their business information systems, not getting enough support with their current system, or both?

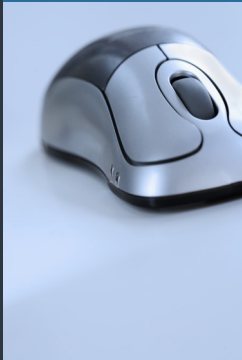
Let your colleagues know that Gilbert & Associates is available to assist them and that we would be honored to have an opportunity to earn their business. Our customers get personal attention, prompt support and solutions that match their needs. We can save the day and you can be a hero! Plus, there's a little something "extra" special in it for you too!

For your first referral that turns into a new customer, we will send you a \$500 Visa Gift Card.

For the second referral that turns into a new customer, we will send you a \$1,000 Visa Gift Card.

For the third (fourth, fifth, and so on) referral that turns into a new customer, we will send you a \$2,000 Visa Gift Card.

Now, wouldn't that be useful for that new workstation you've had your eye on? Contact us for more information or to make an introduction to someone you know with business automation needs.



Sage Pro ERP Tips & Tricks

Q. How can I change the orientation of a Sage Pro ERP report to either Portrait or Landscape?

- A.** After changing the orientation of a Sage Pro ERP report to either Portrait or Landscape, it does not print the report in its new orientation. The following steps can be applied with most reports in Sage Pro. The following example will use the Open Receivables Aging report from Accounts Receivable (AR).
- Example:** To change the default orientation for any standard Sage Pro report, a new custom report needs to be created then change the orientation for that report from the Customize Reports Maintenance screen. For more information, use the following steps:
1. Expand **AR** from the Custom Report branch.
 2. Click **AROREC**.
 3. Click the Add button, the Custom Report and Filters tab becomes active.
 4. Type the appropriate information for the following fields:
 - **Seq#**
 - **Custom Report**
 - **Path**
 5. Select either **Landscape** or **Portrait** from the Orientation list.
 6. Save the changes.

Under the Print menu point to Sales/Status Reports, Open Receivables Aging and click on Detail; the Open Receivables Aging Detail Report option grid appears.

1. Leave all options to default.
2. Click **Generate**.
3. Located on the top-right corner of the option grid select **Organize** from the list; the Customize Report Maintenance screen appears.

Once this is done, printing or previewing should display the report using the correct orientation.

See another example on changing orientation of a printed report on our website at www.GilbertAssociates.com.

Survival 101, cont'd from page 2: These are only some examples of how our customers are using these very trying times to reinvent, rethink, and retool. Whether it means gathering more data from your existing information systems, using CRM to touch your existing customers or reach out to potential new customers, this current economic environment presents amazing opportunities. We encourage you to pull your team together (all of them) and determine what your company can do to stay strong. If you would like to have additional information on these examples, or care to discuss how technology might help your company, give us a call at Gilbert & Associates. We would consider it an honor to help anyway we can.



gilbert
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Don't Miss These Articles:

- Read about our take on Twitter
- Meet our Newest Team Member: Jimmy
- See how other companies are surviving this strange economic time.

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Take a Look!

Did you know that we are constantly adding new whitepapers, tips and tricks, and events to our website? Take a look and tell us what you think!

Also, a new website is coming in the next few months. Watch your email for an announcement coming soon!



Follow us
on Twitter!

<http://www.twitter.com/GilbertERP>

We Want Your Opinion!

Upcoming Customer Loyalty Survey Mid July 2009

A representative from each of our Sage Customers will receive an email from SagePartner@mwshop.com including a link to a survey about how well Sage and Gilbert & Associates serve your business software needs. Please take the time to provide your honest feedback by August 31, 2009. We use this feedback to help shape our business and improve our relationships with you, so please tell us your opinion— good, bad, whatever, we want to know!

Sage Pro System Administration Class

• Fall 2009

Due to a lack of interest, we had to cancel our June Sage Pro System Administration Class. We are rescheduling the class for this fall, but want to make sure it will be valuable to you! Please let us know if you are interested: email Kristen@gilbertassociates.com.



Authorized Partner