

The Advisor

A Quarterly Publication for the Customers and Affiliates of Gilbert & Associates

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Gilbert & Associates Sage Pro Users' Group is coming up! Watch your email in the coming weeks for an announcement and invitation to participate.

Gilbert & Associates Delivers Results For Inderbitzin Distributors, Inc

Family owned, Inderbitzin Distributors, Inc. delivers favorite snack foods to popular convenience stores throughout the northwest. When Dick Inderbitzin started his legacy in 1979, it was just a small company working out of a garage. Within the first few years, Dick's sons joined the team, and since then, the family company has grown dramatically, taking on an excess of 60 employees and expanding to three different locations.

Inderbitzin's rapid growth posed an overabundance of problems with their outdated DOS system including hours of downtime, inaccurate reporting, and frustrated employees. Between the freezing up of their SBT system and the mess that defined the handheld system the truck drivers were utilizing, it was not unusual for Inderbitzin to be two weeks behind in their invoicing and reporting. They rarely had an accurate inventory count, and they couldn't address customer issues immediately.

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Meet the Team: *Kristen Dormaier*

If you have called the office lately, you may have heard a new voice on the other side of the phone. Kristen Dormaier recently joined the team at Gilbert & Associates, taking on the role of Marketing and Sales Associate. Kristen is a recent graduate of Whitworth University in Spokane and worked previously as a Marketing Specialist for a software consulting firm selling CAD software based out of Colville, Washington. Gilbert & Associates had a need for an individual enthusiastic about marketing and who could help assist marketing campaign development; Kristen was a great match.



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TECH TUESDAYS

Tech Tuesdays are a new series of monthly, live, Web-based courses designed to help you become more proficient and get the most out of your Sage Pro investment. Courses are held in real-time, so you can interact with your instructor and classmates just like you would in a classroom. Tech Tuesdays courses occur every third Tuesday of the month.

Visit our website to register for upcoming courses

November 18th, 1-2 pm
Sage Pro ERP Customers

Users will learn how to utilize the software to its fullest, and learn how to use System Manager tools as well as how to more efficiently navigate throughout the system using shortcuts, custom task lists; and many other tips and tricks. This session is a must-attend for all Sage Pro ERP user

December 16th, 1-2 pm
Sage Pro ERP Customers

Learn the how to setup Inventory Control as well as how to classify inventory. Learn how to use Item Pricing using the new features in Pro 7.4.

Striking a Healthy Workplace Balance: How to “Get a Life” While Staying Productive

Think you're working too hard? You're not alone. According to a poll conducted by a well-known online job board, more than 70% of employees believe they don't have a healthy balance between their work and personal life. Countless hours spent toiling at the office can take precious time away from, family life and even a good night's sleep.



Many hard-driving small business managers view this imbalance as an inevitable sacrifice to be made, or even as a badge of honor that shows how devoted they are to their companies well being. But a growing school of thought says that what's bad for your personal life can't be good for your business.

At Gilbert & Associates, we couldn't agree more! Our team has been dedicated to providing superior software options that not only save you money, but give you back the time that was spent on mundane, routine and unnecessary time consuming tasks. Ask yourself this: are you getting the most out of Sage PRO or SageCRM to strike that healthy workplace balance? If not, Gilbert & Associates can help.

Don't hesitate to call us for better tools and information on how to get the most out of your system. And, read some of the other small steps you can take to “get a life” while staying productive in the office on our website at www.gilbertassociates.com.

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Kristen loves spending time outdoors, being active and exploring the world around her with friends and family. While at Whitworth, Kristen competed on the Varsity Track and Field team and is enjoying trying out all of the things she didn't have time for while competing in college. Although she cannot totally abandon track and is hoping to find a part-time coaching position in the spring. Over the past couple months she has filled much of her free time with running, wakeboarding, hiking, geocaching, and mountain biking. She recently moved to Seattle and is enjoying time spent exploring the city with friends.

Did You Know ... In gambling language, for a gambling house a "sure-thing" is a wager that a player has little chance of winning; "easy money" is their profit from an inexperienced bettor, an unlucky player is called a "stiff." (from www.DidYouKnow.org). Don't be a "stiff" and bet on a "sure-thing" by gambling with another solution provider looking at you for "easy money"! Gilbert & Associates is different ... contact us today to learn why we are a safe bet.



With the decision to move forward with Sage Pro, Inderbitzin put their trust in the team at Gilbert & Associates, who implemented a well-rounded solution and a successful link between Sage Pro, Beltek and Data Habitat.

John remembers with appreciation all of the extra hours that Hub and his team put in to make sure that their system could go

live on schedule. "They really came forward to make sure that this was going to work because they believed in it."

With a successful implementation completed, Inderbitzin has increased efficiency throughout the organization. As a result of their increased efficiency, Inderbitzin's workers have saved about two and a half hours of work, weekly; or about 130 hours per year. That is a cost savings of \$136,000 every year on top of a \$30,000 savings in administrative personnel time. Their ability to serve their customers more quickly has increased their revenue because they are now capable of processing more orders. In addition, customers are much happier with the service that they are receiving, and are thereby providing more business.

"Our decision to partner with Gilbert & Associates not only saved us \$166,000 in time and worker productivity, but provided an incalculable boost in worker and customer satisfaction!"

Read the Inderbitzin Success Story in its entirety at our website, www.gilbertassociates.com.

Referral Rewards

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 new customer you refer, we will double the offer to a \$1000 Visa Gift Card.
- ▶ From the third (fourth, fifth, and so on) new customer, we will send you a \$2000 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 TECHNICAL TIPS & TRICKS

Creating a Customer Average Days to Pay Data Driller

Need help in making credit limit decisions for your customers? Visit our website for a step by step guide on how to create a datadrill to display credit information on customers' average days to pay

How do Fiscal Periods and Recalculate History Work in Sage Pro 7.4?

Closing periods in Sage Pro 7.4 affect current and history transactions as well as history inquiries differently from prior versions of Sage Pro.

Current and History Transactions

All transactions are stored in current or history tables to optimize performance, but the way transactions are moved to history is handled differently in Sage Pro 7.4.

Visit our website for the complete guide on recalculating history work.



Don't forget to visit our website regularly. We are constantly updating it with new resources, training opportunities, webcasts, downloads and other current news. Past newsletters are archived along with informational articles that provide you with resources to enhance your business operations.

Take Advantage of Educational and Informational Online Tutorials for SageCRM on our website. Topics include:

- Sales Automation
- Marketing Automation
- Customer Care
- System Administration

If you have suggestions as to the content and/or resources available on our website, don't hesitate to let us know. Call or e-mail your ideas to us.



Utilizing SageCRM to Make Word of Mouth Effective

*Adapted from [The Entrepreneurial Mind](#),
by Jeff Cornwall*

Did you know that a recent poll found that 82 percent of small businesses use word of mouth to grow their business, and that 15 percent rely almost exclusively on word of mouth? Are you one of those business? Gilbert & Associates recognizes that word of mouth marketing and the referrals that it generates is essential to the vitality of many businesses. SageCRM has the tools in place that allow you to leverage your marketing capabilities and ensure that you are maximizing your ability to provide cutting edge customer service that outranks all of your competitors, thus increasing effective word of mouth business.

Providing quality customer care and maintaining satisfied customers are a challenge for every business. Creating good relationships isn't easy and maintaining a good relationship with an existing customer is an even bigger challenge. Are you utilizing SageCRM in a way that allows you to maintain a good relationship with new and existing customers and ultimately keep them happy? If not, some tools that you can use to manage your customers experience and leverage your marketing capabilities are:

- Storing customer information
- Managing a new customer case
- Utilizing SageCRM Workflow to manage the customer care experience
- Establishing service level agreements
- Viewing customer cases
- Creating new customer cases
- And more...

Learn how to utilize the tools within SageCRM to better manage your customer care by visiting our website for a brief video tutorial that points out some easy solutions for streamlining your customer care issues. And, Gilbert & Associates is just a phone call away if you have questions or concerns about making the most of SageCRM, so don't hesitate to call us for tips and tricks to better manage your business.

Spontaneous word of mouth is a rare event. Successful word-of-mouth promotion requires actively finding ways to motivate customers to talk about a business in a positive way.

For more tips to encourage effective word of mouth and to read the article *Word of Mouth Takes Action*, visit our website at www.gilbertassociates.com.