

QUARTER

02

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QUARTERLY-  
NEWSLETTER  
FOR OUR SAGE  
CUSTOMERS

# The Advisor

## SageCRM 200 Server FREE for Sage Pro Customers

Sage Pro customers can get the SageCRM 200 server for free if they purchase at least one SageCRM user.

### You Pay:

- \$795 per CRM User (1 user minimum purchase)
- 18% maintenance on users and server

### You Get:

- FREE SageCRM 200 server (retail cost \$3,995)
- All CRM modules (Sales, Support, Marketing)
- Development environment
- CTI integration
- Mobile

If you are interested in using CRM, this is an option you will want to consider.

Interested or want to know more about this offer? Contact Gilbert & Associates at 206-285-4348.



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## Riding Out Tough Economic Times

*Adapted from an article by Frank J. Gnisci*

Increasing productivity does not mean working harder. Chances are you're already doing that. Increasing productivity means working smarter. Here is a short list of smart strategies that will help you ride out the difficult times.

### **Your Customers Shape Your Business**

To attract more customers, you have to go beyond merely satisfying your customer- but delighting them- with your products or services. Find out what makes your customer tick-determine their wants, their needs, their cares, and what objectives they are trying to achieve. Refer to information organized and stored in your Customer Relationship Management (CRM) software, and keep the information up to date so you can communicate effectively with your customers.

### **Take Advantage of Tough Times**

Tough times are good times to get noticed. At times like these, the field gets smaller as your competitors make themselves invisible. Use quality, cost-effective marketing as a tool to help take market share away

from businesses that are not marketing themselves. Track the effectiveness of your campaign in CRM, use the leads you glean, and learn from the campaign successes and failures.

### **Introduce New Offerings**

What better time than when business is slow to take a look at your current offerings and evaluate how to expand and evolve your area of operation. Take a look at the information in your ERP system, examine which products are thriving and which are struggling. Look for ways to expand your profitable products and adapt struggling products to fit customer needs.

### **Accelerate Collections**

While everyone knows that bad debts cost money, some small business owners are reluctant to go after their slow paying and deadbeat customers. To minimize receivables, the first step is to streamline your billing process. Your accounting system is set up to help keep receivables and billing moving smoothly. Now is the time to learn how to utilize your ERP system's full potential.

*Continued on page 2*

## 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.



## At Your Service: Our New Client Access Portal

Ever wanted to know the status of your support request when no one at Gilbert & Associates was available to help? Our new Client Access Portal allows you to check the status of your service requests and much more at your convenience.

Our goal is to offer you the best support possible. We realize that sometimes your support needs don't always correspond with times that we are available. We recently launched a new Client Access Portal as a way for you to communicate with us. Don't get us wrong, we love to hear from our customers, and don't mind a phone-in support request. This is not meant

as a replacement, but an additional avenue for support when we are unavailable.

Anytime you call us with a software issue or request, we create a service ticket in a program called AutoTask that we use to manage our support. Our new Client Access Portal is linked to these tickets.

This means if you want to check the status of a request, you can log in to the portal and check it at your convenience. You can also submit your own service requests online and access our knowledgebase.

Our knowledgebase is a new addition built on solutions to past customer problems. This is a tool

designed to help you find solutions to common Sage Pro issues and get you back on your feet quickly. Our knowledgebase is constantly growing in depth and breadth of information, so check back regularly for new solutions. Who knows, it may save you the time of submitting a service request!

All active Gilbert & Associates customers should have received an email in late March containing their username and password as well as a link to login to the portal. Please contact Kristen (206.285.4348) if you need help accessing the Client Access Portal or would like to schedule a demonstration.

### ***Tough Economic Times, cont'd from page 1*** **Spread the Word About Your Business**

You can have the best product or service in your industry and still go out of business if people don't know you exist. Keep your company in the public eye by developing an effective advertising campaign. Talk to other business owners and find out what works for them. Talk to your customers and find out what kind of advertising appeals to them. CRM can help you track this information for later use.

### **Don't waste time**

Time is money. Studies show that most businesses

waste 25 to 50 percent of the time it takes to procure a product or unit of service. Even the best companies spend a significant amount of time performing tasks that add no value to their end products or services. Time management is a relatively easy concept to grasp and exploit and will enable you to fuel new product development and new technology.

Tough times require you to make the most of what you have and make smart decisions about what you don't. Give us a call at 206.285.4348 to find out how an ERP or CRM solution may help you.

Read more strategies in the full article at [www.GilbertAssociates.com/doc.htm](http://www.GilbertAssociates.com/doc.htm)

# A Day in the Life of an Implementation Specialist

When Michael was asked to describe his typical day as an Implementation Specialist for Gilbert & Associates he replied, "I don't think I can describe a typical day, maybe a typical week would be more accurate. " Let's just say, there is no typical day in the life of Michael Martin, at least as far as work at Gilbert & Associates is concerned.



Michael exhibiting his latest hobby: fire breathing

constant learning followed by the challenge to put that knowledge to practice in a business setting, but this is a large piece of Michael's job description as an Implementation Specialist.

He said the biggest challenge of the job is also one of his favorite parts- making sure that everyone is taken care of. It takes careful prioritization to ensure client

Monday he may be onsite at a client office doing an install of Sage Pro. Later in the week he may be called in to a client for a few hours to observe and look for inefficiencies in business processes, and Friday he may be in the office doing support for a manufacturing question for an hour followed by support for a payroll question that takes ten minutes.

The variety of tasks and clients keeps the job entertaining. "I get to interact with lots of different people doing both implementation and a bit of programming. I deal with about 40 different clients a week." These clients represent multiple industries each with a unique business model and unique needs.

Prior to work at Gilbert & Associates, Michael's experience was as a Gilbert & Associates client working with the software. When he took on the job, the student became the teacher, and he had to quickly adapt to a new role as the software implementer. There was plenty of room for learning in his early days with Gilbert & Associates, but now it comes in the form of new challenges daily learning client business models and finding solutions to fit their specific needs. There are not a lot of jobs where there is

needs are met. "Our clients are awesome, and a lot of fun. They are number one and it's our goal to keep them all happy."

At the end of the day, when his job at Gilbert & Associates is done, Michael finds a way to unwind. Lately, this comes in the form of his newfound hobby capturing life through the lens of the camera. Other places you might find him after a long day's work include trying out a new recipe, fire breathing, reading a good book, or enjoying a nice pint. And the breakfast of champions? That would be the 3-hour Starbucks Iced Mocha. How he gets it to last so long is a mystery to everyone else at the office.



From Michael's recent trip to Napa Valley, California

See the full-sized pictures at [GilbertAssociates.com/TheTeam.htm](http://GilbertAssociates.com/TheTeam.htm)

## Checklists for Closing Accounting Periods



Have you ever wanted step-by-step procedures for closing out an accounting period in Sage Pro?

We recently posted a handy checklist on our website that we encourage you to print off and use the next time you start your closing procedures.

[Access this article at www.GilbertAssociates.com/Documents/Pro\\_MonthEndChecklists09-1.pdf](http://www.GilbertAssociates.com/Documents/Pro_MonthEndChecklists09-1.pdf)

You can also find this article in our Knowledgebase through our Client Access Portal .

## Tips & Tricks: Key Changes & Mergers

Hopefully you are utilizing the key change functions to change codes for customers, items and vendors. But did you know that as of version 7.4 you can merge two customers or vendors into one. This is handy when a user inadvertently enters a new record for an existing customer. When using this function, you choose which "code" wins, and all transactions against the remaining customer or vendor are merged under the final code. Check it out or give a call for questions.



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3 Reasons to Read This Issue:

1. Read a few strategies for riding out the tough economic times.
2. Learn what life is like as an Implementation Specialist at Gilbert & Associates.
3. Find out a new way to submit your support requests.

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## Check it Out!

Don't forget to check out our website. We are constantly adding new content and resources that might be valuable to you!

Keep your eyes open for new content, webcasts, whitepapers, and news pertaining to you and your business.

And while you're at it, let us know what you think of [GilbertAssociates.com](http://GilbertAssociates.com). What would you like to see on the website? What tools would be useful for you? We would love to hear your feedback!

## Upcoming Demo

### • How to Streamline Your Customer Support from Gilbert & Associates

Learn how to use our new Client Access Portal to submit and view your service requests. Contact Kristen ([Kristen@gilbertassociates.com](mailto:Kristen@gilbertassociates.com)) to schedule your demo.

## Excel 2007- The Basics And Beyond

### • Coming May 2009

Whether you are a novice or expert Excel 2007 user, this hands-on learning is for you. Microsoft Office Excel is a powerful program that helps you analyze, share, and manage information to make informed decisions. This course is meant to get you up to speed not only with the basics, but a few advanced features as well.

View the flier on the course at [www.GilbertAssociates.com/events.html](http://www.GilbertAssociates.com/events.html).



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