

## If We Only Had a Better System - Five Insights into this Common Ailment

If you had a dollar for every excuse or lament that started with, “If only we had a better system...,” you’d be retired and yachting off the coast of San Tropez, right? What if you discover “the system” is more than likely not the problem? What if you can use the system you already have to get what you need done?

Many companies make the mistake of believing a “system” is the solution. *If we only had the right CRM system, our pipeline would be in better shape.* In reality, the system is just a tool and one of the components used in the solution. For example, a Customer Relationship Management (CRM) solution is comprised not only of a CRM system, but a collection of business processes, metrics, user guidelines, and other components. A “broken” solution may actually indicate a problem with one or more of these other components. Taking this further, even if you replaced “the system,” you may still have a broken solution if the other components do not change.

So without replacing “the system,” how can you improve the productivity of your existing solution? How can you identify the components that need improvement?

Here are five key insights to help get you started.

### 1. Identify Inefficient Business Processes

*“If only we had a better system...I would be able to have the financials done sooner.” Mark issues the financials four to six weeks after a fiscal period is closed. Even though transactions are reviewed during initial processing, Mark reviews all transactions again during the close process in case something was missed.*

Business processes are a critical component to a solution. They provide direction, accountability, responsibility, and controls. This is a key area to review for inefficiencies or problems. Reviewing business processes must be done objectively with many “whys” asked. It is also very effective for someone not actually involved in the business process to be on the review team.

Like the bottom line of your profit statement, business processes need to provide more benefit than they cost. A process that includes taking four hours to review an account that is already reviewed by another department may not bring enough benefit to overcome the cost. Components of a business process are important as is the timing of the component. For example, a process that has data reviewed far down the timeline from the data origination, will cause any error correction to take much longer than if it were addressed earlier.

In the example above, we see a process that is basically run twice. Either the first process is not effective or the second process is providing little extra value. In either case, the two processes must be consolidated. Once this transpires, issuing the financials should occur much earlier.

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## 2. Mine Data You Already Have

*“If only we had a better system...I wouldn’t be surprised by the sales figures.” Melanie dreads the end of the month. Accounting delivers her the month’s sales reports. She has to compare her sales forecast to the actual sales and explain the differences. It is a really bad month when the actual sales are far below her forecast.*

Most systems are designed to facilitate a specific purpose. For example, a sales system may create and issue invoices to customers. But that doesn’t mean the information the system houses can’t be used for other purposes. Ideally, information is collected once and stored in only one place per given set of information. Business Intelligence solutions can take disparate data and return it to the individuals who need the information in a timely, relevant manner.

The same set of information can provide different meaning to different people. One group may look at data from a company perspective and another analyzes it from the department perspective. Data captured in one system can be combined with data in another to bring more meaning to the information. For example, you may already have a report that lists the revenue by customer. However, would your relationship with the customer change if you also saw the applicable company costs netted with the revenue by customer? How would your marketing initiatives change if you merged customer demographics with number of sales per year and learned customers with 200 to 500 employees purchased your product 5 times as often as other customers? By repurposing existing data, you can gain helpful insights into the sales patterns of customers and emerging market trends which, in turn, will help inform your own marketing and sales campaigns.

In our example above, Melanie would be much more informed if she could query actual sales daily. She then would be able to increase sales efforts or revise expectations to avoid the month-end surprise.

## 3. Keep The System Up to Date

*“If only we had a better system...I would be able to save money on postage for mailing our customer statements. Our system doesn’t have the technology of newer systems.” It is customer statement time again in the Accounts Receivable department. For one day everything stops while statements are printed, stuffed into envelopes, and mailed to the clients. Hundreds of statements are mailed out to clients reminding them to pay their invoices. By the time the clients receive them, almost a week has passed and the information is dated bringing on a flurry of phone calls.*

It is incredible how many companies do not maintain the investment they have in a system. To compete, most systems are constantly improving to keep up with the latest advancements in technology.

They pass these benefits down to existing users via upgrades including new features and functionality. If the system developer doesn't have a feature you need, there is a good chance that some outside developer will have created or can create an add-on to your system that will provide the feature. There are many ways to keep your system up to date, including:

- Applying system upgrades
- Attending user groups and conferences
- Reviewing system or industry-related newsletters and websites
- Maintaining relationships with other users and business partners

In the example above, department time and mailing costs could be greatly reduced if the department looked into emailing customer statements or providing a customer facing web portal.

#### **4. Provide Post-Implementation Training**

*“If only we had a better system...I would be able to search for a customer by their phone number and wouldn't accidentally create a duplicate customer.” During a system implementation, usually all people affected get some sort of training. But what happens two months later when some (or most) of the topics are forgotten? What happens when John is replaced by Mary?*

During the system implementation there is a great deal of knowledge being thrust upon your employees. They have to quickly ramp up to do their respective jobs. System features are forgotten or not covered during the implementation training so as not to overwhelm the employees. In addition, employees leave and new employees are hired that depend on training from peers. Periodic refresher training can keep your employees up to date on how to fully use the system and to introduce new features and functionality. Refresher training builds upon the knowledge base the employee already has. In addition, user guides, tutorials, and other help options can be reintroduced to provide some self-training methods.

In the example above, John may not know about an alternative search screen. When Mary replaces John, this particular knowledge transfer cannot take place, creating a hole in the knowledge base for the position. By having refresher training, issues can be brought to light and addressed.

#### **5. Automate Manual Processes**

*“If only we had a better system...I wouldn't need to re-input the web sales into the sales system.” Joan spends the first three hours of every day entering the previous day's web sales into the sales system. Max prints a report from the web system that Joan then compares to her entries to make sure she didn't make any mistakes.*

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## Five Insights to Improve Your Existing System



Fact: There will never be a perfect system that handles all your requirements exactly how you want them handled. A system that handles complex invoice calculations may not have a web store. The system with the web store may not have a commission component. Therefore, many solutions will involve more than one system in order to handle all your requirements. This does not mean that data has to be entered twice. Task automation and automatic integrations can extend and enhance the existing solution. There are many tools available to help systems “talk” to each other.

A solution review should identify the various systems and how they interact. Data may be shared or synchronized automatically. This not only eliminates dual entry, but it eliminates potential errors as well. Timing must also be taken into account. If system B requires an up to date inventory, this integration may need to occur more often or perhaps in a different way than transferring sales information to system A.

In the example above, a system integration could be developed to push the web transactions into the sales system. Then Joan could just review by comparing the integrated transactions to the web report.

The insights above illustrate that “the system” is not the solution. The system is just a tool and one of the many components that comprise a solution. Periodic component review can keep a solution healthy and resolve the real issues behind the lament.

To start ask yourself:

*“Are my business processes clearly defined and communicated to applicable employees?”*

*“Would I gain business insight if two disparate data sets were brought together?”*

*“Have I been maintaining my systems and keeping up with the latest trends in my industry?”*

*“Do I keep my employees educated to get the most out of our solution?”*

*“How could I increase the efficiency of my solution?”*

By reexamining your existing solution, you can bring relief to the “If we only had a better system” ailment.

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