

# ASI Client Connection

## Solutions Not Systems: Rethinking the RFP Process

Every year, countless businesses look for a new system to implement that solves a problem or challenge they are having. From Accounting to Customer Relationship Management, companies are flooding the market with Requests for Proposals (RFP) on various technologies and software solutions.

Unfortunately, the current RFP process is taxing on both buyers and sellers, and usually leaves companies disappointed with their selected solution. Why? The answer lies in the process itself: Buyers are requesting solutions that meet requirements without defining their challenges first.

In the RFP process, buyers have the daunting task of researching systems, which includes attending all-day presentations, watching countless demos, comparing a long list of vendors, and assembling all this information into one huge document — a list of requirements that spell out the need for something called a “Financial Management System” or an “Enterprise Reporting System” (ERP) such as Microsoft Dynamics GP or SL. (cont. on page 2)



# ASI

Associates Solutions, Inc.  
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### Don Cumbie Takes Over Dynamics CRM Division

ASI is very proud to announce that effective 2/1/2011, Don Cumbie has assumed leadership of the Dynamics CRM division. Don brings with him over 13 years of support experience with Microsoft solutions. Don has been with ASI since 2001 and has been instrumental in the growth of ASI's consulting practice. Don's strong leadership skills and effective project management skills have been vital to ASI's success. Congratulations Don!

# Cover Story

## Cont. from pg 1

And let's be honest most sellers struggle with the RFP process — just responding is considered a victory. Sellers want to do more than respond to a request list, they want to help the real people, to understand the buyer's challenges.

### Why is the RFP Process like this?

So why do buyers go through this time-consuming process just to end up saying, "I don't remember which vendor showed me which system!" Common responses to this question include:

- "We want an even playing field."
- "We want multiple offers."
- "We want a comprehensive view of the market."

These sound like logical reasons for the way the RFP process is, but they can miss the point and rarely help buyers find the best vendor with the right solutions.

### Focus on the Challenge, not the Software

For companies, the RFP process usually disappoints in the end. Expectations aren't met and goals aren't achieved because they were not set correctly in the first place. Buyers are looking for the solution, but they haven't identified their business challenges or problems to vendors.

### How to Change the RFP Process for Buyers

Buyers need to start asking hard questions that address real problems or challenges in the company. Instead of requesting for a proposal, buyers need to request solutions to specific problems like reducing corporate risk or operational overhead.

What if a buyer requested...

- Reducing inventory holding costs by 20%, or...
- Help maximizing vendor discounts or...
- Tools to complete consolidated financial reports

Buyers just might get real solutions and skip the long-drawn-out process altogether. What every company needs is a solution to a problem. Yes, these systems were designed to solve such business problems, but buyers often choose the wrong one, resulting in a waste of time/money and an implementation that never lives up to buyer expectations.

The next time your company submits a RFP for a new system, break the cycle! Don't settle for a process that turns out a system you don't need. Only settle for technology solutions that actually solve your problems.



# ASI Updates

## Customer Appreciation 2011

Mark your calendars and please plan to join us for our annual Customer Appreciation Event Thursday June 9th from 11:00-2:00 at the ASI offices in Lenexa, KS.

We have made changes this year to the format based on our customer feedback from last year. The event will be shorter but will still feature lunch, prizes, a keynote and product specific breakout sessions. Highlights this year include new versions of Dynamics SL and CRM to showcase along with the enhancements to Dynamics GP 2010 R2. Look for formal invitations and agendas coming soon. If you would like to sign up for the event, you can email [Joy](#) or [Chris](#) and we will be happy to register you.



### Upcoming Training

ASI is proud to announce the following Training Class and seminar schedule. If you are interested in attending, please contact Joy McRae or Chris Jarvis at 913-384-9677 to get scheduled.

- **May 18th – FRx/Management Reporter Training**  
8:30am-4:00pm- Associates Solutions offices
- **May 24th – Basic CRM Training**  
8:30am-4:00pm- Associates Solutions offices
- **May 26th – Smartlist Builder/Excel Report Builder**  
8:30am-12:00pm- Associates Solutions offices

### Upcoming Events

ASI is proud to announce the following event schedule. If you are interested in attending, please contact the Sales team at 913-384-9677 to reserve your spot.

- **May 5th – eCommerce Joint Webinar presented by AzoX and ASI. More information [here](#).**  
10:00am-11:00am CDT-Online GoToMeeting
- **June 9th – ASI Customer Appreciation Event**  
11:00am-2:00pm- Associates Solutions offices



# Product Spotlight

## Star Ship By V-Technologies

StarShip has helped thousands of companies get their goods out faster and easier. But it's not just about shipping. Integration into the accounting/ERP system also saves time in accounts receivable and customer service while the dashboard allows management to see a high level view of trends and shipping costs.

StarShip is a complete shipping solution which Integrates with many financial packages to eliminate double entry of shipping information. Starship also supports multiple carriers in one user interface while keeping a central location for shipment history. Freight charges are calculated through the use of an optional integrated scale. Starship can rate-shop between the available carriers to find the most economical way to ship your packages and supports 3rd Party Parcel Insurance to cut insurance costs by up to 65%. You can also print carrier-approved bar coded shipping labels and COD tags.

### **Streamline Shipping**

No more wasted time re-entering data and risking costly errors. Plug-and-play interfaces provide the warehouse with instant access to orders and invoices. Simply scan the document number from your pick sheet to auto-populate the ship screen.

For maximum efficiency StarShip takes advantage of item information on the order to create the Commercial Invoice.

AES Direct integration reduces compliance risks and speeds processing

### **Ship small packages and pallets**

All from one user interface. StarShip supports the national parcel carriers (**UPS, FedEx, DHL, USPS**), regional carriers (**OnTrac and Spee-Dee**) and LTL options such as **Freightquote.com, YRC, SMC3**. Produce package and pallet labels, packing lists and a Bill of Lading (BOL).

### **Enhanced Dynamics GP interface**

The Dynamics GP interface now takes advantage of line item information from the Sales Transaction. This provides even more automation with auto-pack features and easy generation of labels and reports.

To learn more visit: [http://www.vtechnologies.com/starship\\_home.htm](http://www.vtechnologies.com/starship_home.htm)



### **Thought for the Quarter:**

**"There are risks and costs to a program of action, but they are far less than the long-range risks and costs of comfortable inaction."**

**John F. Kennedy**

# Microsoft Dynamics SL 2011: Built for dynamic businesses

**Microsoft®**

## What's New at Microsoft?

With Microsoft Dynamics SL 2011, you can raise the bar for productivity, performance, and growth across your entire organization. Take advantage of the latest technology innovations with a new web services architecture that delivers stronger performance and efficient integrations for your current systems—and those you implement in the future. You can enhance your ERP solution by connecting with Microsoft Dynamics CRM to sync customer and project data, and access Microsoft Project Server 2010 to bring together processes and financials.

Dynamics SL builds on the updated interface and improves the user experience. The activity panes, search functionality, and role based menus improve adoption rates and lower training costs. The new Quick Query tool provides predefined views of accounting data that can quickly be sent to programs like Excel and Word for further analysis. For those who use multi-company, the hot new feature will be the ability to open multiple company screens within a single session. You will now also be able to color code companies to eliminate confusion during data entry. Users of Dynamics SL 2011 will also be able to utilize the Microsoft Management Reporter, a real-time financial reporting system.

For many companies, Document Management is in their future and Dynamics SL 2011 is set to provide the tools needed. The DocShare feature allows employees, customers, and vendors the ability to share and collaborate on documents using Microsoft SharePoint technology. Users of Dynamics SL 2011 will now have the ability to attach documents directly to screens allowing companies to save on printing and document storage costs.

Project driven organizations will also greatly benefit from the release of Dynamics SL 2011. The two way integration with Microsoft Project Server 2010 allows companies to maintain projects from either solution. The Business Portal for Dynamics SL 2011 allows users to key in time and expenses, set up projects, assign resources, create budgets, and more, all through the web. If you need to allocate inventory to projects, Dynamics SL 2011 gives you the tools to meet project demands and stay on track and on budget.

Also new for Dynamics SL 2011 are web services for customer and project data. Users can now use web services to connect to other solutions such as Dynamics CRM or other in-house products. Web services will allow for better performance and tighter integrations while bringing together the front and back offices.

CRM 2011 on Premise is ready! Microsoft Dynamics® CRM 2011 can easily be called the most significant release in the history of our product. It includes over 500 enhancements and a wealth of new features.

While Microsoft Dynamics CRM 4.0 provided a rich Outlook experience, 2011 provides a true native Outlook experience by taking advantage of the new capabilities in Outlook 2010. And with 2011, Outlook is no longer a plug-in, it is a true native Outlook experience. CRM is Outlook.

With Microsoft Dynamics CRM 2011, organizations can create forms specific to each individual role that tailor the presentation of the information that is displayed on that form.

And with Microsoft Dynamics CRM 2011, creating role-based forms is easy and straightforward using the drag and drop customization capabilities of the software.

Contact Sales at 913-384-9677 to get your preview!



# CRM Tips & Tricks

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### Dynamics CRM 2011: Custom Activities

With Microsoft Dynamics CRM 2011, users can now create any **custom activity** and track all related aspects of that custom activity.

This means users can add new tasks, assign resources, create resource groups, execute workflows, and in general track any activity from beginning to close without any customization or complex custom coding.

An example of a custom activity could be “Onsite Repair” for field service organizations that frequently send service staff to customer sites for mechanical or machines repairs.

Users also can now leverage the new bulk actions support and complete, cancel or change “Set Regarding” in activities in masse rather than having to open up each activity manually. A huge time saver for organizations that handle a large volume of activities.

### ASI Staff News

Congratulations to the following ASI employees who will celebrate anniversaries with us this spring!

Sean Bragdon-5 Years

Michael Wright-4 Years

Jason Leib- 4 Years

A logo for ASI Associates Solutions, Inc. featuring a person's hands holding a globe, the company name, and the Microsoft Gold Certified Partner badge. Below the logo is the address and website.

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