

What the Heck is

Digital Transformation

and What Does it Mean for Your Business?



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“86% of CEOs say digital transformation is their number one priority,” reports a recent Price Waterhouse Cooper study.

But what does that mean exactly?

Like most big concept buzzwords, “Digital Transformation” means something different to almost everyone. You hear it thrown around with terms like Internet of Things (IoT) and Predictive Analytics. But could digital and technological advances really have an impact on YOUR business?

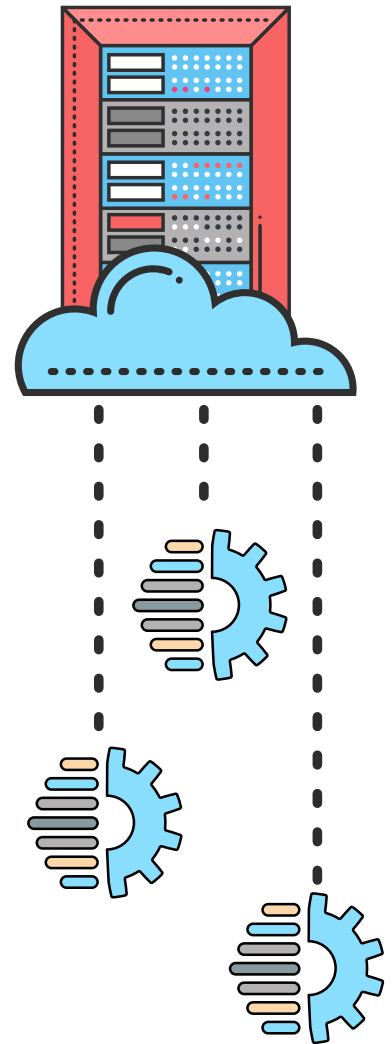
To get a practical, real-world perspective, we asked technology experts, people in the trenches of modern business, for their definition.

The common theme was clear. **Digital Transformation is what happens when businesses rethink processes, services and products in terms of what is possible using current technology.** From clever ways they learn to use the data they collect to figuring how the internet allows them to deliver services across the globe, companies succeeding with digital transformation are using modern business management systems to gain customer insight, automate processes and support new business models.

To help you understand what your own digital transformation can look like, we collected real-world stories from businesses using ERP, CRM and the cloud to rethink their future. In the following pages, you’ll find deeper explanations of what technology advances can mean for your business so you can evaluate and choose the right new business systems.

The Potential of Digital Transformation

1. [Rediscover customer engagement](#)
2. [Connect without boundaries](#)
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1. Rediscover customer engagement

While the internet can connect you to lots of new prospects and customers, it can also de-personalize those relationships. To make customers feel valued in a world of digital transactions, you need to use data to “know” your customer better.

Keep customers front and center

With unified business management systems that centralize data, you can support processes to keep your customer front and center. Connected customer data allows you deliver personalized, consistent sales and service—so you can compete with the best in your industry. By breaking down the silos between your business processes and tapping into the power of your data, you can:

- Enhance customer experiences with personalized interactions from consideration to purchase.
- Give agents the information they need to deliver faster, more consistent service and proactively address issues.
- Act on your data to anticipate and respond quickly to trends impacting your customers, your business and market demands.



Bridging barriers

A medical care clinic serving an ethnically diverse community implemented a CRM system which includes workflows to:

- Send automated, language-appropriate appointment notifications to patients and notify the physician if an interpreter is needed for an appointment.
- Trigger notifications of significant events (reschedule, cancellation, no-show, etc.) to all parties.
- Send patients a post-appointment survey to rate facility comfort, care experience and more.



2. Connect without boundaries

Employees and customers alike are no longer bound by location. Business teams can be spread across the globe. Customers can be next door, or in another country without any difference in the way you serve them.

Support virtual collaboration

Today, there are many options to promote personal connections and collaborative teaming through the cloud and the internet. Portals, document sharing, project management sites, voice/video services and more allow you to design collaboration systems that serve the unique requirements of your business.

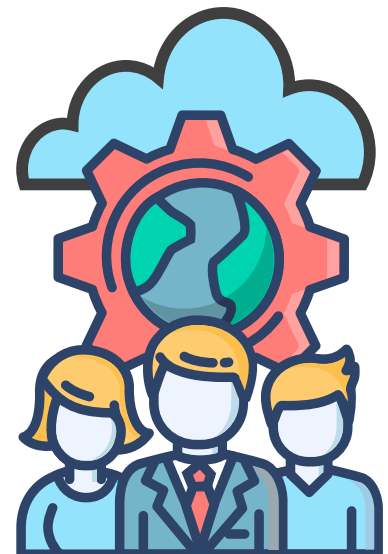
Workers, especially millennials, expect the systems and tools they use to help them work productively and conduct business anywhere, on any device. With boundary-free systems, you can:

- Provide customers with self-service options, allowing agents to spend more time providing personalized attention to special circumstances.
- Manage team projects through centralized portals with built-in document, task and budget management.
- Give secure access to remote and home workers, supporting high productivity and employee morale.

Connecting project teams

A professional services company uses project portals to keep team members and clients in lockstep. The portals include:

- Shared files and dashboards to support the project tasks and monitor progress.
- Threaded conversations to support real-time interactions and documentation that cuts down on disputes.
- Workflows to support approvals for purchases as well as time and expenses to reduce administrative delays and improve cash flow.



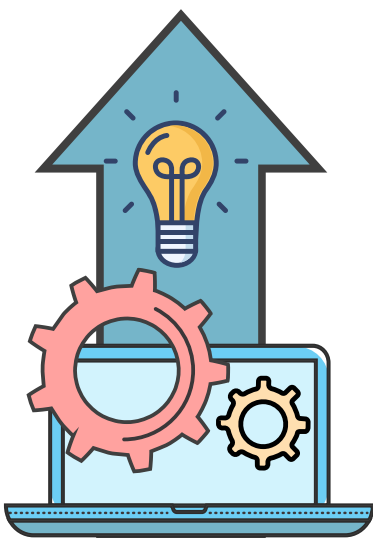
3. Optimize operations

By tapping the data within your organization, you can automate and streamline many of the manual processes that consume your employees' days. Connecting and exchanging data across your business units allows you to respond more quickly to challenges and opportunities.

Re-design processes to stay ahead

Modern business management systems connect the flow of data and processes across marketing, sales, service, operations and supply chain. With unified systems, employees can provide better customer service and spend more time on profitable activities. Optimized operations include:

- Simplified financial procedures, such as workflow-driven purchase approvals and budget reviews to reduce wasted time tracking down signatures.
- Reinforcing consistent business processes by implementing workflows that guide employees to follow critical procedures—such as safety and inspections.
- Automated functions to improve customer communication. Send emails at critical points in customer order processing—such as order confirmation, production updates and shipping notices.



Tracking product history

Making the most of the data required to meet regulatory compliance, a bio-med company automated every aspect of their supply chain. Through automated data collection, the company is prepared for a recall through:

- Expirations and serialized parts at the lot level.
- Tracking back one step to their vendor and forward one step to the receiving physician for every item.
- Captured e-signatures to document receipt of product and accompanying disclaimers at the time of delivery.



4. Modernize service delivery

Through technology, service workers can deliver better customer experience than ever before. From the field technician to the call center agent, connected information cuts through the delays and barriers to make customers happy and boost productivity.

Exceed customer expectations

Service is fast becoming the differentiator for every type of company. Connected data and systems allows service departments to optimize scheduling, dispatching, parts management and customer interactions—no matter where they happen. By implementing connected systems, you can:

- Provide service technicians with complete customer insight, real-time guidance and cross-team collaboration.
- Improve first time fix rates by ensuring the best technician for the job is dispatched.
- Use data collected through the Internet of Things (IoT) to improve service—from replacing lights in smart buildings to avoiding machine downtime with preventive services.

Information in the field

An HVAC company uses connected systems to notify their field service workers when they've been assigned a case, schedule them when they're available and route them in the most efficient way possible. Onsite, technicians have access to parts inventory that can be delivered next day.

When a job is completed, the customer signs their approval on a tablet. Automatic routing means the invoice leaves the main office before the service truck has pulled out of the driveway.



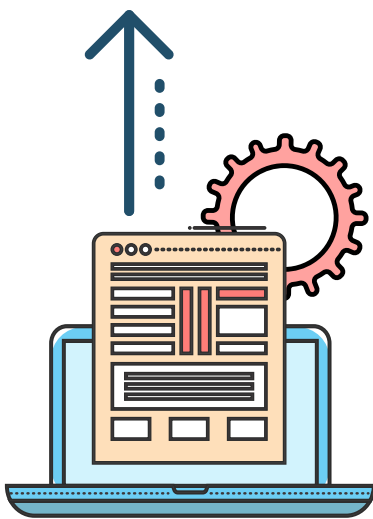
5. Reinvent business models

The status quo doesn't make it for most in the digital economy. There are many paths organizations can take—from adding new services to combining with other firms to building new channels—but aging, disconnected business management systems can't support new directions.

Not just for enterprise-level businesses

Unified systems that connect accounting, sales, purchasing, inventory and customer interactions are affordable and easy to use for every size company through the cloud. Modern business management systems allow you to expand distribution channels, add services or enter new markets without big software investments. Your business can:

- Take advantage of data and machine learning to improve your understanding of customers, operations and markets.
- Use IoT to gather and analyze real-time product usage for making informed decisions about the direction and development of new offerings.
- Streamline mergers and acquisitions without losing momentum.
- Use data visualization to help managers see trends and exceptions as they navigate through new operations.



Expanding market reach

A manufacturer exposed its entire product catalog on the web, dramatically increasing their market reach and streamlining order taking. Continuing to build their internet presence, they:

- Created a portal for distributors to check inventory, access sales tools and place orders.
- Provide extensive technical documentation to support service technicians, customers and distributors.
- Support self-service product support, order placement and returns—all accompanied by instant chat support if customers want to speak to a real person.



6. Support data-driven decisions

Data has become as valuable as cash to businesses. Few businesses have a shortage, but data comes with its own challenge—how to transform it into intelligence that generates action to drive the business forward.

Visibility to build your business

Modern business management systems are designed to centralize data from across the organization. Real-time data updates help you spot trends, prevent issues and deliver great customer experiences. With a complete picture of your business from a centralized source, you can:

- Streamline financial close, including multi-company allocations to get real-time visibility into the performance of your business.
- Apply proactive business intelligence that helps prevent issues and deliver better customer experiences.
- Monitor trends and changes across your supply chain to adjust purchasing and optimize inventory.
- Empower users with dashboards and self-serve reports from trusted data sources for faster, more informed decision-making.

Insight in action

A large hospital was struggling to manage their complex staffing requirements which included specific patient to caregiver ratios as well as coverage by certifications/degrees/qualifications. Costs were out of hand as they over-staffed to assure coverage.

Implementing a system to centralize employee and patient data and automate scheduling, managers can easily see “who is where” on a schedule, along with staff qualifications. Alerts notify managers when they are “approaching overtime” so they can make proactive decisions about scheduling.



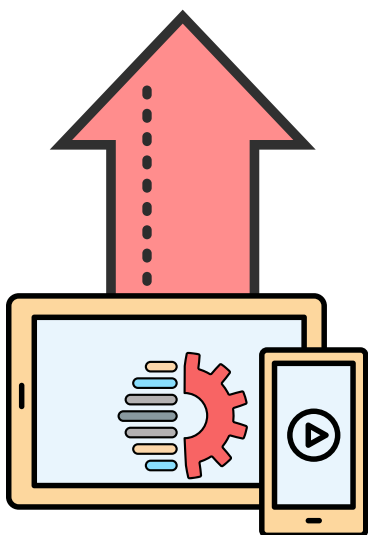
7. Reimagine business systems

Outdated or obsolete business management systems can limit your ability to address challenges and emerging opportunities. When legacy technology stands in your way, there are growing options to get more out of your existing investments and support the functions and workloads you need without breaking the bank.

Focus on business, not technology

With today's technology options, you can choose to move completely to the cloud or to mix on premises and cloud solutions, capitalizing on your current technology investments. Working with an experienced technology partner, you can unify systems while reducing the complexity and cost of IT. Unified business systems will allow you to:

- Streamline your most common processes and automatically connect information across formerly isolated business processes.
- Instantly access information without wasting resources on data extraction and tying data from different sources together.
- Protect your business data from modern security threats such as cyberattacks or stolen devices.



Fishing for efficiency

A fishery reimaged their business processes by replacing spreadsheets with a cloud-based ERP/CRM system. Each day, catch reports from fishing vessels are automatically uploaded to a cloud-based business intelligence system. The fishery then:

- Identifies which vessels caught the specific types of fish needed to fill orders the next day.
- Combines orders to optimize pricing and efficient delivery.
- Transmits purchase orders to the fishing ships.

The right systems to fuel your digital transformation

The best way to start your own digital transformation is to work with someone who has been down this path before. There are a number of proven business management solutions on the market today that provide robust functional options for you to choose from. A qualified technology partner can help you make the right choice based on your unique business requirements.

Next Steps

CAL Business Solutions works with companies like yours that are:

- Growing out of financial packages like Quickbooks.
- Evaluating the pros and cons of moving ERP to the cloud.
- Ready to transform their business with better systems for Financial Management, Distribution, Manufacturing, Field Service, Project Accounting, e-Commerce, Business Intelligence, HR/Payroll and CRM.

[Read success stories](#) outlining the business challenges, solution and benefits experienced by CAL Business Solutions clients. You can be our next digital transformation success story.

To start, let's schedule a call so we can learn more about your current system and your goals to help you determine if Microsoft Dynamics GP or Acumatica Cloud ERP is a fit for you.

Contact us at 860-485-0910 x4 or sales@calszone.com.



About CAL Business Solutions

Founded in 1982, CAL Business Solutions is a Connecticut based company focused on Microsoft Dynamics GP (Great Plains) and Acumatica accounting software.

- Microsoft Dynamics GP Highlights: www.calszone.com/gp
- Acumatica Cloud ERP Highlights: www.calszone.com/acumatica

One client described us as the “nuts and bolts guys.” We don’t wear fancy suits or close deals on the golf course. We are just a practical, hardworking team that has built our reputation by implementing the right software system to solve our customers’ issues at the right price. We don’t try to sell you extra bells and whistles that you don’t need, just because they look nice. We don’t speak in “techno jargon” or bore you with fancy PowerPoint slides. We will give you honest advice, clear goals, straightforward answers, and a software system that works.

If you are considering new ERP software, upgrading your existing system, or if you currently use Microsoft Dynamics GP (Great Plains) or Acumatica and want the best local support and training, contact CAL Business Solutions.

- Get to know our team, our offices and our business values in the short video [“Meet the CAL Team”](#).
- Download the white paper [“30 Questions Every CFO Must Ask About the Cost of Accounting Software”](#)

Contact CAL Business Solutions:

George Mackiewicz, President

P: 860.485.0910 x4

sales@calszone.com

www.calszone.com

Twitter: [@CALERPNews](https://twitter.com/CALERPNews)



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