

High Tech & Electronic Equipment Companies

Gain Greater Efficiency, Agility and Control with a Unified ERP and CRM Solution with Microsoft Dynamics

An Axonom White Paper



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Introduction

Volatile markets. Capital-intensive research and development. Global competition and outsourcing.

These are only a few of the considerable industry challenges semiconductor, related device and electronic equipment (high tech) companies face as they attempt to grow and increase profitability. To overcome these difficulties and position their organizations to become the next Apple or Intel, high tech firms need to optimize and adapt their business processes for greater efficiency, agility, and control.

At the heart of every high tech company are front- and back-office business processes that are ripe for optimizing, automating, and unifying. And while the majority of high tech companies already have some form of enterprise resource planning (ERP) and customer relationship management (CRM) capabilities, most do not have a solution designed expressly for their unique industry requirements.

Only a unified, high tech-specific ERP and CRM solution can deliver the highest level of visibility and control firms need today to continue innovating at a rapid pace and increase market and customer responsiveness, while controlling costs and adhering to regulations.

This white paper discusses the unique aspects of the high tech industry and the impact of industry challenges on the back- and front-office business processes within high tech companies. We'll take a close look at the requirements of high tech firms and the benefits of deploying a unified, industry-specific Microsoft Dynamics AX and CRM solution.

Unique Requirements and Business Process Imperatives for High Tech Companies

Few industry sectors are as fastpaced or as volatile as the high tech industry. Companies in this sector are faced with enormous challenges that play out in very unique ways within their enterprise business processes:

Creating and promoting innovative products – According to Accenture, the window to bring new products to market has shrunk by as much as 400 percent in the past decade. Creating and optimizing businesses processes that accelerate the development of sophisticated, complex products is a must for high tech firms.

Driving sustainability leadership

 As consumers and governments increasingly choose products and companies based on adherence to sustainability principles, high tech companies are under pressure to make a strong commitment to sustainability. This commitment means that the business processes for supplier selection and relationship management, product design, product recycling, and more must ensure compliance with the company's and its customers' sustainability goals.

Increasing market and customer responsiveness – High tech firms need to minimize costs and reduce risks intensified by shorter product life cycles, increased product complexity, and changing demand. To do this, high tech firms need to increase the agility and responsiveness of the following two areas:

Operations: High tech companies must improve overall effectiveness and efficiency of operations, while adapting to changing demand patterns, forecasting accurately and collaboratively with suppliers, and driving cost savings.

Supply chain: Companies in the high tech space must have greater visibility into their diverse supply chain for improved planning and decision making. Execution of supply chain processes need to be streamlined to improve responsiveness to changing customer needs and market demands.

Managing complex sales channels

 Improved management and utilization of a multi-tiered sales channel can help companies increase sales, reduce costs, stay close to the end customer, and decrease non-selling time.

Today, many high tech firms find themselves at an inflection point – the time is ripe to move to the next stage of company maturity and growth or risk stagnating and losing their competitive edge. A unified and industry-specific back office and front office solution – ERP and CRM – is critical to meeting your unique industry challenges and positioning your business for growth.

"BEST-IN-CLASS ERP IMPLEMENTATIONS IN MANUFACTURING SLASH 100 PERCENT MORE COSTS THAN ALL OTHER COMPANIES, WITH 120 PERCENT BETTER GROWTH IN OPERATING MARGIN AND 170 PERCENT IMPROVEMENT IN TIME TO DECISION." *ERP IN MANUFACTURING 2011*, KEVIN PROUTY AND NICK CASTELLINA, ABERDEEN GROUP, JULY 2011



Positioned for Success with a Unified, Industry-Specific ERP/CRM

Unlike standalone ERP and CRM systems, a unified front- and back-office solution for high tech companies supports the industry's specific business challenges, models, and processes to enable the alignment of the supply and demand chains. The following sections describe the functionality that high tech companies need to optimally support their back office, front office, and cross-departmental business processes with Microsoft Dynamics.

ERP REQUIREMENTS FOR HIGH TECH COMPANIES

First we'll review the back office processes that your solution needs to support. Then we'll review the front office processes as well as the unified processes that span the two.

Figure 1 shows the areas of ERP functionality and the back-office business processes they should support. The following describes the capabilities you should look for in a high techspecific ERP system:

Financial Management. Your ERP system should include core financial management capabilities that incorporate high tech requirements. These financial capabilities encompass comprehensive accounting functionality, including general ledger, accounts receivable, fixed assets, and budgeting and forecasting. Financial reporting and analysis are also essential capabilities.

Supply Chain Management. Your ERP system should streamline and automate your business processes throughout the supply chain to im-

prove planning, optimize inventory levels, reduce costs, and enable your company to respond quickly to changes in customer and supplier demand.

Human Resources Management.

Your ERP system should help you effectively manage and align your workforce to achieve your business goals. To do this, you need real-time information about employees, jobs, and specific skills across your organization.

Product Lifecycle Management

(PLM). PLM helps you manage the entire lifecycle of a product from its conception, through design and manufacture, to service and disposal. It is important to have a clear approach for managing your PLM processes within your ERP system, or tight integration to a preferred, third-party PLM system.

Production Management. Real-time insight into business and supply chain information—including inventory, warehouse, and in-house as well as outsourced production activities—can help you optimize production flow by planning effectively, maximizing resource utilization, driving accurate

delivery performance, and streamlining business processes.

Business Intelligence and Report-

ing. Look for an ERP system that delivers easy-to-use, self-service access to business information to help users make faster, better decisions. The business intelligence capability can be an embedded part of your system, or unified with a best-of-breed business intelligence tool. Either way, you'll

want to ensure your solution includes industry-specific operational reports and easy access to information that facilitates self-service reporting.

Workflow Management. Workflow automation helps users visualize and quickly prioritize the work they should be doing. The system should not only document when users finish their work, but help them follow consistent processes and focus on their most

important tasks.

Global Risk and Compliance Management. Your ERP system should enable you to improve internal controls and increase visibility into risk and compliance-related processes and activities. Specifically, your ERP should help you comply with a variety of requirements and customer mandates, including financial, legal, and environmental.

"EIGHTY-NINE PERCENT OF HIGH TECH MANUFACTURERS ARE CURRENTLY USING SOME FORM OF ERP. THE BENEFITS OF ERP FOR THESE ORGANIZATIONS ARE AMPLIFIED IN THIS INDUSTRY BECAUSE HIGH TECH TENDS TO HAVE A HIGH VELOCITY IN BOTH ITS DAY-TO-DAY OPERATIONS AND ITS NEW PRODUCT INTRODUCTION (NPI) PROCESS." ERP IN HIGH TECH: DRIVING INNOVATION WITH INSIGHT, NICK CASTELLINA, ABERDEEN GROUP, FEBRUARY 2012

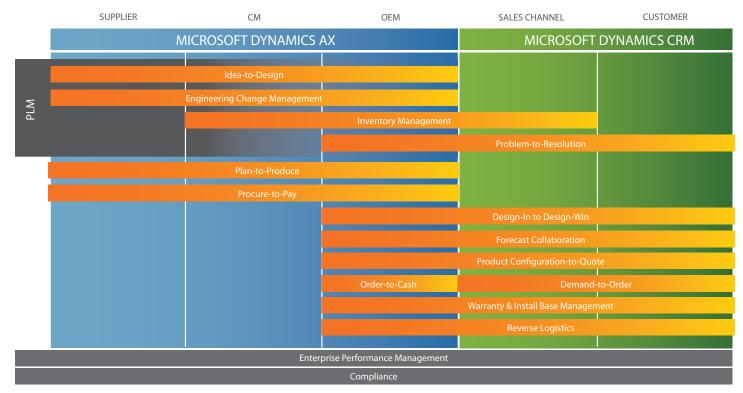


Figure 1. Microsoft Dynamics Functionality to Support Back-Office Business Processes



HIGH TECH-SPECIFIC CAPABILITIES YOU NEED IN YOUR ERP SYSTEM

While many ERP systems can provide you with some of the above functionality in a generic, "every business" kind of way, high tech companies need industry vertical-specific capabilities. Here are some common business challenges and requirements of high tech companies that only a high tech-specific ERP solution can accommodate:

Mixed-Mode Manufacturing. High tech companies often need to continue evolving their businesses to survive. As such, they need an ERP system that doesn't just support lean, process, or discrete manufacturing, but one that supports all of these production models in a mixed-mode manufacturing environment. This includes supporting the differences in inventory measures and bills of materials, as well as other potential areas where the business processes differ. While many high tech manufacturers have adopted lean manufacturing processes, traditional ERP applications are not optimized to support a

lean, pull-based Kanban environment alongside discrete work orders for bills of materials (BOMs), constraint-based semiconductor production with reverse BOMs, and process manufacturing based on formulas.

Supply Chain Partner Integration.

You need the ability to easily connect with your global supply chain partners regardless of the internal systems they may be using. Look for an ERP solution that gives you a comprehensive range of integration possibilities with your partners, including support for open standards such as Rosetta Net and EDI, as well as support for industry-specific requirements for integrating partners such as third-party logistics companies, contract manufacturers, foundries, fabs, and distributors.

Production Route Flexibility: Your ERP needs the flexibility to handle production route changes without manual interventions that cost your company time and increase risk. For example, your company may start with a planned route to be used for production, but based on cost analysis, capacity constraints, demand variations,

and other factors, you may choose to deviate entirely from the planned production route, make changes to the process that result in a different finished good, or you may split a portion off to a different production route such as an alternate production line or plant, or different subcontractor because of capacity or cost issues. Your ERP system should be able to handle any of these situations.

Planning Complexity. In the high tech business, planning complexity is a given and your ERP system needs to accommodate changes and variations from the original plan. For instance, a company producing a lot of solar cells can expect that due to subtleties in variations of the process, the individual final products will vary in their levels of performance and as such, they may test out to a different bin of goods, impacting the ability to fill dependent demand. Additionally, some of the items will fail to meet spec and will result in yield loss. Many ERP systems plan for and build a single part and typically restrict you to completing that single part. For high tech, you need an ERP system that not only lets you complete multiple parts off of a work order but also lets you anticipate and plan for those multiple finished goods or product "bins" and yield loss to ensure planning accuracy.

Tracking Channel Sales. Look for an ERP system designed to handle the complexity of channel sales and give you total visibility throughout the channel. Many companies will need their ERP to track channel sales across multiple parties in the transaction including distributors, value-added resellers, end customers, parent companies of end customers, and others. Recognizing revenue based on distributor sell-through is another capability many high tech companies require. In this case, the ERP needs to provide visibility into inventory stock levels that have been sold to a distributor before products are sold to an end customer and then recognize the revenue once confirmation of a sale is received.

"... ONE OF THE MAJOR PAIN POINTS FOR THIS INDUSTRY [HIGH-TECH MANUFACTURERS] WHEN IT COMES TO BUYING A NEW ERP SYSTEM IS FINDING A SOLUTION THAT FUNCTIONALLY FITS HIGH-TECH SPECIFIC BUSINESS REQUIREMENTS AND QUICK-LY ADAPTS TO FAST-CHANGING BUSINESS PROCESSES." BEATING COMPLEXITY, ACHIEVING OPERATIONAL EXCELLENCE — CALL TO ACTION FOR THE HIGH-TECH INDUSTRY, PIERFRANCESCO MANENTI, IDC, JULY 2010

CRM CAPABILITIES FOR HIGH TECH COMPANIES

High tech companies typically have multi-tiered sales channels and unique marketing requirements that go beyond what a standard customer relationship management (CRM) system is built to handle. With a Microsoft Dynamics industry-specific CRM solution, high tech companies can better manage their complex sales processes and distribution model, drive value-added sales activities, speed new products to market, and prioritize high-value accounts for maximum profitability.

To optimize sales and marketing processes, high tech companies need to deploy a CRM system that offers the capabilities required to support key front-office business processes

For each front-office business process, your CRM should provide functionality that automates and optimizes that process. Below, we describe the functionality you should be looking for

in a CRM system:

Marketing Automation. Your CRM system should enable you to track and coordinate marketing campaigns with sales efforts, and identify how current campaigns are impacting sales. Look for a system that delivers automated email tracking, web intelligence, lead scoring, marketing analytics, and customizable workflows that can help sales teams maximize opportunities.

Product Configurator. One of the critical functions high tech companies need is a product configuration capability that delivers sophisticated quoting and ordering functions. Look for a CRM solution that supports full kitting, SKU variants, and unlimited product dimensions to build complex pricing and product configurations easily and accurately.

Forecasting. High tech companies need a CRM solution that can handle complex, multi-channel revenue forecasting. Seek out a solution that can provide detailed, global information

that tracks orders (plan to actual) over time against trade agreement commitments to improve coordination among your sales, financial and manufacturing groups, as well as partners.

Sales Opportunity Management.

Your CRM needs to provide a centralized system to track sales opportunities and communications with customers and prospects. It should empower your sales force to efficiently identify and manage opportunities, while giving you better demand forecasting, insight into key performance indicators, and identification of critical success drivers.

Partner and Customer Portals.

Particularly relevant for high tech companies, your CRM should enable you to easily provide your key internal and external business partners, such as distributors or manufacturers reps and customers, with the information they need. A self-service portal improves the customer experience, reduces costs, and adds value for your business partners.

Warranty management and customer service. Your CRM should include warranty/maintenance contract management, software licensing management, and customer service capabilities. Customer service features to look for include: multi-level, return material authorization (RMA) and incident service management, escalation handling, field service, product problem tracking, and cross-product defect management as well as integration with a call center dialer or voice system for auto dialing and caller ID capabilities.

Workflow Automation. To improve productivity and ensure compliance with corporate policies, choose a CRM system with integrated workflow capabilities that allow you to automate routine tasks and escalate activities based on other events.

Business Intelligence and Reporting. High tech companies need a CRM system that supports automated alerts, workflow, and forecasting capabilities to proactively manage customer demand, inventory availability, production schedules, and more. With robust business intelligence and reporting capabilities, you can keep a close eye on emerging sales trends, know which products are most profitable, and which customers are essential to your success.

Organizational and Territory Management. Look for a CRM system that lets your company set up territories and teams, then manage and optimize them for greater organizational efficiency. You should be able to reassign accounts, easily define new territories, and analyze performance by territory.

Mobility. Choose a CRM that makes your sales force more productive by giving them real-time access to customer, sales, support and product information inside and outside the office, on the device of their choosing.

Two Trends in CRM Optimization to Consider

While not specific to high tech, there are two maturing trends impacting CRM solutions that you should consider when making your CRM selection:

Social Productivity. Social CRM is the convergence of social technologies with CRM processes and technology. Based on your sales model and target market, integrated social collaboration capabilities can help your company improve sales productivity, deepen relationships, and gain more insight into the behaviors and needs of your customers.

Big Data / Data Augmentation. Big data gives companies the ability to find insights and identify trends by harvesting and analyzing the massive amounts of data available within a business. Most CRM systems today offer only very basic analytics and reporting. However, to turn raw customer data into actionable insight, you need a CRM system with a robust business intelligence capability or the ability to tightly integrate with a tool to provide greater value from analyzing the "big data" about customers.

Integrated support for tools such as data augmentation and correction, social media collaboration sites (LinkedIn), and data intelligence (Inside View) are no longer emerging technologies, but core CRM sales and marketing capabilities.

THE KEY DIFFERENTIATOR: UNIFIED BUSINESS PROCESS ACROSS THE ENTERPRISE

While selecting ERP and CRM systems that are designed specifically for high tech companies is critical to ensuring your front- and back-office processes are optimally supported, it's even more essential to select a solution that unifies your business processes across departments, locations, and systems. This means looking for industry-specific ERP and CRM systems designed to work together, with built-in support for cross-system business processes. Cross-system business processes flow between your CRM and ERP automatically, and include accounting, order management, quotes, invoices, credit management, shipping status, backlog, available-topromise, inventory status, financials, and other areas of the business.

In addition to these processes, there are several others unique to high tech companies that your ERP and CRM systems will need to support in a unified manner:

Design-Win. This process is becoming more popular with emerging fabless and other high tech companies. To enable visibility and control of the design-win process, your ERP and CRM systems need to deliver integrated capabilities that support the process across the enterprise. For instance, design-win best practices to look for include: support for samples management, design in, design registrations, trade agreements, designwin, and multi-period forecast management to track actual orders against trade agreements. You'll need the ability to track all sales, engineering, and customer service activities that go into winning a design, and your staff needs to be able to track the designwin opportunities they are working on.

You also need insight into the manufacturing and financial requirements of a potential design-win before it occurs. Information needs to be captured in one place, in this case the CRM system, and then automatically pushed to the ERP system. Figure 2 shows the capabilities required across both your CRM and ERP systems to support the

design-win process.

Channel Sales Workflow. Most high tech companies sell primarily through the partner channel – distributors. manufacturer representatives, partner resellers, and more. But working with multiple partners adds complexity, particularly around forecasting, collaboration, and supply chain management. ERP and CRM systems designed to work together through unified business processes help optimize channel sales workflow. For instance, your CRM system should enable you to streamline the quoting and ordering process for your trading partners, while forecasting information for partner-driven deals is automatically transferred to the ERP system for more accurate production planning. Leveraging channel visibility tools such as POS reconciliation and price management strategies let you maximize sales channel effectiveness.

Price Management. High tech companies require greater flexibility and control of pricing than businesses in other industries. Starting with your

CRM, information about pricing and commissions needs to flow to your ERP so that you can reconcile commission payments, costs, and negotiated prices such as price protection, ship and debit, and stock rotation. Many companies must manually input information from the CRM to the ERP system, impacting productivity and hindering visibility into real-time changes. Your ERP and CRM systems should enable a unified process, with data automatically transferring between the systems.

Order-to-Cash. Support for an end-to-end, order-to-cash business process can help improve your time to revenue significantly. A unified process across your CRM and ERP systems automatically synchronizes customer, product, pricing, quotes, orders, invoices, and install base information. You can also improve customer service with more accurate and synchronized customer and order data, with visibility across the entire business process.



Figure 2. Unified Process for Design-Win Across Microsoft Dynamics Systems



The Armanino Consulting Solution

Armanino Consulting brings together industry-leading ERP and CRM capabilities in one unified solution specifically designed for high tech companies. Our deep domain and industry expertise means that we understand the challenges and requirements of the high tech industry and are uniquely qualified to help your company position itself for growth and success.

BUILT ON INDUSTRY-LEADING TECHNOLOGY

The Armanino Consulting solution is a highly tailored Microsoft Dynamics CRM and Microsoft Dynamics AX industry solution for high tech companies, combined with Axonom's suite of Powertrak modules. Our solution delivers the visibility you need to manage every aspect of the supply chain, including contract manufacturing and trading partner management, as well as balance demand with production efforts, maintain optimum inventory levels and meet customer expectations profitably.

Armanino Consulting's Certified for Microsoft Dynamics AX modules natively extend Microsoft Dynamics' already powerful capabilities with additional high tech features designed to support:

- Complex revenue recognition requirements for electronic equipment manufacturers and other companies subject to VSOE
- Supply chain integration with vendors, contract manufacturers, and customers
- Forecasting and planning accuracy for semiconductor and mixedmode electronics manufacturers
- Streamlined management of the outsourced supply chain, consigned inventory, and overseas manufacturing
- Complex, multi-tier channel sales including distributor sell-through relationships

As part of the Armanino Consulting

Microsoft Dynamics CRM solution, Axonom's Powertrak for High Tech suite includes support for design win, forecasting, customer and partner portals, quote and product configuration, service management, and project time and billing.

SERVICES AND BEST-PRAC-TICES TEMPLATES COMPLETE THE SOLUTION

With more than 18 years of experience developing solutions for the high tech industry, Armanino Consulting can provide full-service implementation support for your end-to-end business processes. Armanino brings deep industry best practice expertise and provides comprehensive industry-specific application functionality to

accelerate the deployment of a unified solution across your enterprise.

As one of the largest ERP and CRM Gold Certified Microsoft Dynamics Partners in the country and the only Microsoft VAR with comprehensive industry-specific application functionality designed for the high tech industry, Armanino Consulting has a proven track record of successful Microsoft Dynamics and CRM implementations. Our high tech clients include industry movers and leaders such as Impinj, Microsemi, and dpiX to name a few.

Since 2009, the firm's clients have won four prestigious Customer Excellence Awards, including the 2012 Industry Excellence Award, at Convergence, the Microsoft Dynamics annual user group convention.

Armanino Consulting provides award-winning sales, implementation and support services for Microsoft Dynamics and Powertrak solutions including: system implementation, integration, and customization as well as technical support and IT outsourcing. And Armanino Consulting's pre-configured solution templates for the high tech industry reflect accounting and software best practices to improve quality and reliability, lower costs, and accelerate implementation.

In addition to providing world-class implementation expertise for our clients, Armanino Consulting develops and supports Dynamics AX for High Tech Industries, a Certified for Microsoft Dynamics AX (CfMD) ISV solution.



WHY CHOOSE THE MICROSOFT STACK?

Microsoft Dynamics brings together the broad range of Microsoft technology, making it easier for businesses to collaborate, connect and deliver results. Microsoft Lync, SharePoint, and SQL Server BI tools provide embedded communications, collaboration, and analytics capabilities within the end-to-end business solution. Microsoft Dynamics CRM runs in Outlook, so users can move between tasks with greater ease and without disruption.

This pervasive interoperability drives productivity, creates a better user experience, reduces IT costs and complexity, and puts new Microsoft products into customers' hands without headache. For example, it is easy for your IT department to support the Dynamics suite of solutions on the familiar Windows platform and SQL infrastructure they work with daily. Users can seamlessly move data between Microsoft Dynamics business

applications and Microsoft Excel to empower ad hoc analysis.

THE BENEFITS OF UNIFYING YOUR BACK-AND FRONT-OFFICE PROCESSES

By replacing your outgrown, disparate back- and front-office systems with a unified, industry-specific solution from Armanino Consulting, your company can gain an end-to-end view of your business and greater operational transparency and control. And the Armanino Consulting solution is scalable to support large enterprises, enabling you to easily add new locations, introduce new products, and expand to new geographies around the globe.

With a unified, high tech ERP and CRM solution from Armanino Consulting, your company can:

- Increase visibility and control of the supply chain
- Improve forecast accuracy and timeliness

- Streamline operations for less overhead and cost
- Improve management of R&D and sales
- Deepen partner and customer relationships
- Become more agile and responsive to changing market conditions

CUSTOMER EXAMPLE: SUP-PORTING GROWTH WHILE INCREASING CONTROL AND QUALITY

Nordic Semiconductor, a fabless semiconductor company based in Norway, was on a growth trajectory, but knew it needed to first gain more visibility and control of its business operations. The company turned to Armanino Consulting for a solution that would to help it improve quality and profitability while enabling growth without a significant increase in personnel. The goals of the new ERP and CRM solution from Armanino Consulting were to enable better collaboration with Nordic's partners and suppliers, reduce production errors, and deliver easier access to integrated customer, distributor, and supplier data, as well as enable better management and control of logistics, warehousing, finance, and production.

The Armanino Consulting solution enabled Nordic to grow at a rapid pace – with production volume quadrupling, while achieving its original quality and profitability goals. Since the deployment of the solution, the company has:

 Eliminated manual efforts and resulting errors in processing subcontractor transactions. The company can now support up to 100 times more transactions than before with the same personnel

- Improved inventory levels through integration of forecasting, point of sales (POS), and distributor inventory data
- Reduced the number of systemrelated incidents, with more secure handling of incidents
- Increased the number of individual price agreements it can support with end customers
- Implemented the ability to handle stock, ship, and debit (SSD) transactions with distributors

Nordic Semiconductor achieved all this without increasing the number of logistics staff. Despite producing four times the volume, the company only hired one additional production person. Finally, the user-friendliness of the system combined with access to integrated data has been a productivity and collaboration boon to the company's employees as well as its suppliers and distributors.

"MICROSOFT DYNAMICS AX ... HAS HELPED US INTEGRATE GLOBAL OPERATIONS IN REAL TIME, REDUCE INVENTORY, IMPROVE PRODUCTIVITY, AND BE MORE PROACTIVE IN OUR DECISION MAKING." SCOTT HOWARTH, PRESIDENT AND CEO, ISSI

Conclusion

Microsoft Dynamics AX and CRM systems are essential solutions that every high tech company needs at the core of its business. While the vast majority of companies do have some form of these systems, what separates the industry leaders from the rest of the pack is the visibility and control that only a unified, industry-specific ERP and CRM solution can provide.

With years of high tech industry knowledge and experience, Armanino Consulting can help your company meet the complex challenges of your industry with a high tech-specific, best practices-based ERP and CRM solution. With the Microsoft Dynamics for High Tech Industries and Powertrak technologies at its core, the Armanino Consulting solution incorporates all the capabilities your company needs to help it grow and thrive.

For more information about Armanino Consulting's Microsoft Dynamics AX and CRM Solutions for High Tech, visit http://www.amllp.com/microsoft-dynamics.

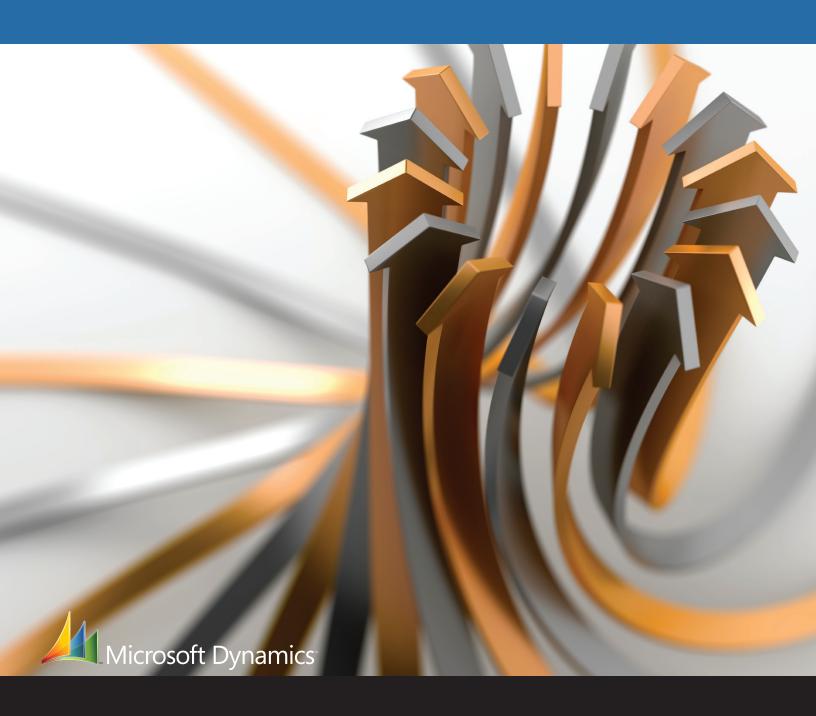


About Armanino Consulting

Armanino Consulting, a key division of Armanino McKenna, provides comprehensive services to the CFO organization of fast-growing companies, including Microsoft Dynamics implementation, CFO Advisory and Outsourcing services. The firm is the 35th-largest public accounting and business consulting firm in the nation, a Microsoft President's Club member for many years, and the fastest-growing firm on the West Coast, according to Accounting Today.

About Axonom

Axonom, a B2B solutions provider, delivers tools to successfully service customers and partners in an environment that requires multi-level relationship tracking, web self-service, partner/dealer loyalty management tools, streamlined quote-to-order processing, hassle-free payment options and a world-wide presence. By delivering more transactions more efficiently through channels at a lower cost, Axonom's Powertrak solution helps customers realize greater profit potential.





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