



*We'll get you there.*

# Cloud-based Enterprise Resource Planning for Manufacturers

November 10, 2022

Adam Gardiner – Digital Growth Senior, CLA

Brendan Kurvers – Principal, CLA

Paul Dubuque – Manufacturing Product Specialist, Acumatica

Wally Tonra – Partner Account Manager, Acumatica

CPAs | CONSULTANTS | WEALTH ADVISORS

©2022 CliftonLarsonAllen LLP. Investment advisory services are offered through CliftonLarsonAllen Wealth Advisors, LLC, an SEC-registered investment advisor.



The information herein has been provided by CliftonLarsonAllen LLP for general information purposes only. The presentation and related materials, if any, do not implicate any client, advisory, fiduciary, or professional relationship between you and CliftonLarsonAllen LLP and neither CliftonLarsonAllen LLP nor any other person or entity is, in connection with the presentation and/or materials, engaged in rendering auditing, accounting, tax, legal, medical, investment, advisory, consulting, or any other professional service or advice. Neither the presentation nor the materials, if any, should be considered a substitute for your independent investigation and your sound technical business judgment. You or your entity, if applicable, should consult with a professional advisor familiar with your particular factual situation for advice or service concerning any specific matters.

CliftonLarsonAllen LLP is not licensed to practice law, nor does it practice law. The presentation and materials, if any, are for general guidance purposes and not a substitute for compliance obligations. The presentation and/or materials may not be applicable to, or suitable for, your specific circumstances or needs, and may require consultation with counsel, consultants, or advisors if any action is to be contemplated. You should contact your CliftonLarsonAllen LLP or other professional prior to taking any action based upon the information in the presentation or materials provided. CliftonLarsonAllen LLP assumes no obligation to inform you of any changes in laws or other factors that could affect the information contained herein.

# Learning Objectives

- Benefits of cloud-based vs traditional on-premise ERP
- How integrated functionality can help you do more with less
- Enabling a remote workforce with the proper ERP
- Bringing AI/ML to your business on day 1
- The power of accurate data in real-time for an organization



# Who are we?



Adam Gardiner  
Digital Growth Senior  
CLA



Brendan Kurvers  
Principal - M&D  
CLA



Paul Dubuque  
Manufacturing Product  
Specialist  
Acumatica



Wally Tonra  
Partner Account  
Manager  
Acumatica

# Poll

Do you feel like your organization is doing a good job making data-driven decisions?

- Yes
- No
- We could do better



# Current Manufacturing Trends

- Supply chain delays
- Rapidly changing customer demands
- Labor shortages

***Manufacturers continue to demonstrate resiliency and determination to adapt to whatever comes their way***

# Poll

Which of the following is the biggest challenge to your organization today:

- Sales and inventory forecasting
- Automating processes
- Eliminating redundancies
- Collecting and analyzing data



# Digital Transformation via Cloud-based ERP

- Support remote work
- Simplified deployment
- Lower costs
- Decreased need for dedicated internal IT resources
- Ability to quickly add users and functions to accommodate growth
- Flexibility – Manage multiple entities with one system





# Poll

What percentage of time is your finance staff dedicating to manual processes?

- <10%
- 11-25%
- 26-50%
- >50%



# A new era for ERP's

- Eliminate redundant processes
- Automate mundane tasks
- Provide employees access to critical information
  - Make better decisions, faster
- Leverage AI/ML with the proper system setup
- Create personalized customer interactions
- Integration with other key applications provides greater visibility into the company's health



# The Cloud ERP for Resilient Business

Built for mobile and telework scenarios and easily integrated with the collaboration tools of your choice, Acumatica delivers flexibility, efficiency, and continuity of operations to growing small and midmarket organizations

**Acumatica Cloud ERP**  
provides the best business  
management solution for  
digitally resilient companies



Connected business

**Delivered**



Rapid integrations

**Delivered**



Remote collaboration

**Delivered**



Business resilience

**Delivered**



Future-proof

**Delivered**



# Manufacturing Edition

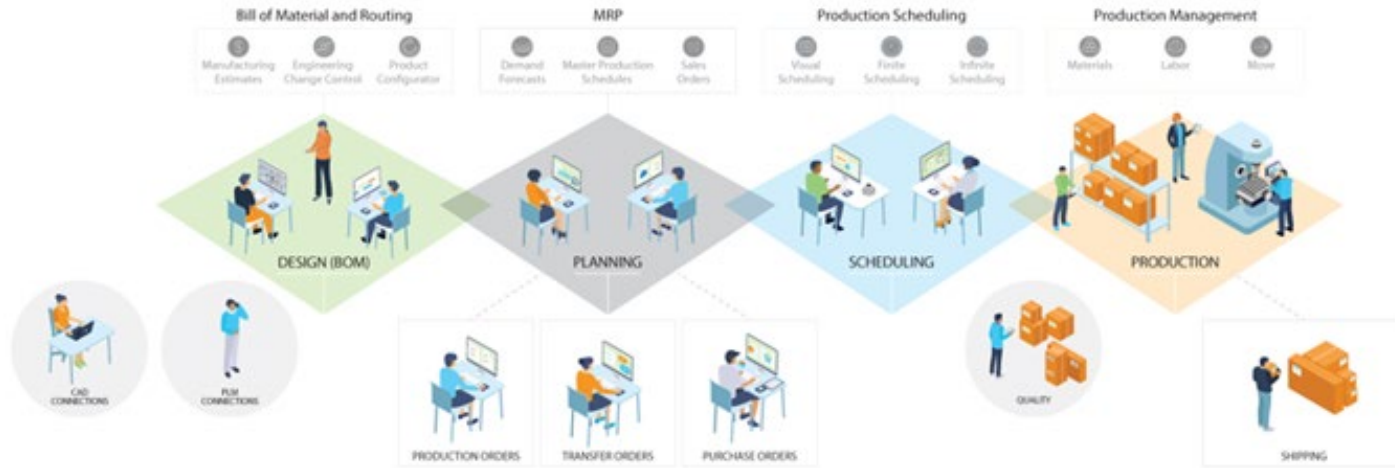


# Manufacturing Edition



- Bill of materials and routings
- Production management, scheduling, and costing
- MRP (Material Requirements Planning)
- Shop floor data collection via scanners
- Estimating
- Product configurator
- Advanced planning and scheduling
- Integrated quality management
- Discrete and process manufacturing

# Manufacturing Flow



# Manufacturing – ERP Success!

- Scaling Power Producer – QBD to cloud-based ERP with remote workforce
- Rapidly Growing Food Manufacturer – Fine tuning full scale integrated functionality and real-time data
- Aftermarket Auto Parts Manufacturer/Distributor– Leveraging real-time data to power sales through EDI platforms and re-order points





# Questions



*We'll get you there.*

CPAs | CONSULTANTS | WEALTH ADVISORS



Thank you!

Adam Gardiner

Adam.Gardiner@claconnect.com

Brendan Kurvers

Brendan.Kurvers@claconnect.com



CLAAconnect.com



CPAs | CONSULTANTS | WEALTH ADVISORS

©2022 CliftonLarsonAllen LLP. Investment advisory services are offered through CliftonLarsonAllen Wealth Advisors, LLC, an SEC-registered investment advisor.