

A Consulting and Software Company Specializing in the JD Edwards Market Space, Advisional, LLC Creates Software Complementing the JD Edwards Package with User Friendly Tracking and Reporting for Auditing

**Business Services
Lifecycle Management**

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**Donna Lozano
CEO**

BIO: CEO Donna Lozano leads the strategic direction and business operations for Advisional. In addition to managing day-to-day operations, she has developed long-term relationships to extend and expand Advisional's consulting services and product capabilities to meet clients' needs. Donna draws upon a wealth of industry experience that includes, agriculture, engineering and construction, distribution, financials, manufacturing, medi-

cal supply, municipalities, oil and gas, oil field services, pharmaceuticals, real estate, retail, and software industry sectors.

Donna's exposure to Information Technology and ERP solutions began early on as a recruiter, focusing solely on technology. After working in the recruiting industry for only two years, Donna, then 25, established her own recruiting firm where she discovered a strong niche in the AS/400, JD Edwards' marketplace. In 1996, as the JD Edwards market continued to emerge, Donna chose to evolve her recruiting practice into a full-service, multi-million dollar JD Edwards consulting firm.

As Y2K neared, Donna was approached to sell her consulting firm to a group of investors; having always desired to be a stay at home mom, Donna sold her consulting firm in 1999. However, she returned to the JD Edwards consulting industry when she bought back the then floundering firm in 2001 and once again built a successful multi-million dollar practice.

In 2003, a then unknown software company known as, InsightSoftware.com, convinced Donna to merge her talents with their product and enter into a partnership selling their UK based reporting software. Donna was the first US based representative of Insight® and was the number one sales person in the world several years during her tenure. Due to her strong customer relationships and integral knowledge of the software itself, Donna was able to once again build a multi-million dollar company.

Enjoying tenures in both consulting and product sales, Donna chose to join both facets in co-founding Advisional. Her goal is simply to meet her customers' needs whether that be a best of breed software solution, or a consulting engagement to maximize a client's ERP investment.

About Advisional, LLC:

It is the goal and expectation of Advisional, LLC to cultivate successful long-term partnerships with our clients by consistently delivering exceptional service and value.

In keeping pace with the ever changing business landscape, Advisional is able to deliver innovative solutions and clear business direction, thereby enabling our clients to become high-performing, best in class, organizations.

**Interview conducted by:
Lynn Fosse, Senior Editor
CEOCFO Magazine**

CEOCFO: Ms. Lozano, would you tell us the concept at Advisional?

Ms. Lozano: The concept for Advisional is that we are a consulting and software company, specializing in the JD Edwards market space. We have hired a great team of people who understand, not only the software of JD Edwards, but they understand business as well. When you are doing an implementation, when you are upgrading, it is critical that someone understands your industry, how the software can be used to maximize the functionality and integration to give you a better focus on your business and give you better reporting capabilities and give you better KPI

capabilities and so on. Along with that, we also see when there are specific needs in that JD Edwards software space that could be improved upon. In doing that we have written software that compliments the JD Edwards package and makes it even more user friendly in tracking and reporting for auditing.

CEOCFO: Why do you like the JD Edwards software? Obviously, you have built a company around it.

Ms. Lozano: JD Edwards focuses on small to mid-sized companies. There are companies that are fifteen billion and twenty billion dollar companies that still have JD Edwards, but they started out as a smaller company. JD Edwards is a very integrated software, so your entire workflow is connected. Not a lot of the other ERP solutions do that well. It is an excellent data base; that information source is very critical in managing your business. Quite honestly, the companies that choose JD Edwards are great companies to work with; you will find many entrepreneurs. I am from Texas, so we say, "Pull yourself up from your boot straps". You will find a lot of those types of companies. They are very independent thinkers and tend to gravitate towards the JD Edwards solution. Not only do I like the software, I like the companies that buy the software.

CEOCFO: Would you give us an example of some of the common features that you bring to the table, and maybe some solutions that people would be surprised could be adapted to work with the system?

Ms. Lozano: Every consulting firm brings similar things to the table. They should know the software. They should know business. They should be people oriented individuals; people that look for solutions. Therefore, like many consultant firms, we do bring those things to the table. I think a differentiator will be our focus in specializing in the JD Edwards market space. That is our only focus. We are Oracle Gold partners and we do have a product that enhances the change management functionality within JD Edwards. Those are some

differentiators as well as our customer service; our availability to our customers. Most of our customers do work Monday through Friday, because we are a B to B solution. However, in the IT industry you have upgrades on the weekends. You have "go-lives" on the weekends. We are very willing to make ourselves available off-hours to make sure that our companies are successful. I have been in this marketplace since the late 1980's and I still have some of the same customers all these years. I do not think that you can maintain that customer base and that relationship without doing some things that are different. You need to "set yourself apart".

CEOCFO: Are there particular industries of focus for you?

Ms. Lozano: Not really. That is because the financials are the same across industries. You do have

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manufacturing, you do have distribution, you do have retail, you do have apparel and several other industries. However, we have that breadth of knowledge within our firm, so there is not a specific vertical as far as an industry that we focus on.

CEOCFO: You did mention business experience. When you look for your people what are the intangibles? How do you know that they really can work well in the relationships that you are looking to develop and maintain?

Ms. Lozano: I make a lot of hiring decisions on my gut, quite frankly. You are going to know very quickly, during the interview process, whether this is a people person or a self motivated person. That is pretty easy to vet out early in an interview process. Technically, of course, you might be a people person, but you have still got to have those technical skills to be able to facilitate an implementation or

upgrade with a client. Therefore, from a technical stand point, we also have an interview process where you are vetted out technically. That involves our CTO, not myself. We check references thoroughly, as well. Once again, having been in the industry since the late 1980's, I know many people already. Therefore, I am probably going to know someone who knows you.

CEOCFO: Word of mouth is always good.

Ms. Lozano: It is critical.

CEOCFO: Are there different levels of service that you provide? What is your offering?

Ms. Lozano: From a service offering it really runs the gamut. We can do managed services. We can do implementations. We can do upgrades. We can do assessments. If you are wondering if your systems and

your infrastructure where it is supposed to be, we can certainly come onboard and do an audit and make recommendations for future growth plans. We can do business process assessments. Are you taking advantage of the full functionality offered to you by JD Edwards? Many companies are not. They did an implementation, they had a deadline, they wanted to get it done; but they did not properly evaluate all of the business process options within JD Edwards to fully take advantage of the functionality of the integration that JD Edwards offers.

CEOCFO: How do you insure that what you offer is user friendly? What is the key?

Ms. Lozano: The key to making something user friendly is really being keen on user adoption. You have got to have training. I would have to agree with you; there is nothing that is totally user friendly. You can get around it, you can pick around it; but if you are really going to do well you need to have training. User adoption is critical to the success of any project and you are not going to have good user adoption without good training. Therefore, I think training is the key part, to answer your question. JD

Edwards, right now in their latest release, has completely rewritten their user interface. It can now be menu driven. Therefore, in the implementation we can create custom workflow menus to add to the user friendliness of the software.

CEOCFO: Would you tell me about your growth strategy?

Ms. Lozano: Growth strategy is going to the market with a solution, in addition to consulting, so that you are able to contribute at multiple levels. From a growth strategy, not only are we going to do more consulting, but we are also going to expand into more managed services. Companies are looking for third party solutions for their help desks, they are leaving those pieces outside of their organization. That is because as they train someone in a particular software, that person does not want to stay in a support role; they want to be active in implementations or upgrades and to continue to increase their skills. It is hard for companies to maintain that resource. Therefore, we want to offer

resources that enhance and contribute to their company growth. And, just like any other company, we make sure that we maintain our customer base while we are out there developing new clients. We continue to focus on our existing relationships in addition to establishing new ones.

CEOCFO: Do you find it is easier to hire the right people? I do not mean that it is just the right fit, but many people have told me that just the pool of tech people is so small these days.

Ms. Lozano: I agree with you. I think that the pool of available talent is tight. Our reputation in the industry, having been in the industry for a while and with our CTO, Louis Frederick and his reputation as being a strong technical resource; that gives an advantage when it comes to hiring. That is because people want to work with us.

CEOCFO: You have been involved in other business ventures. What have you learned in previous ventures that have been most helpful here at Advisional?

Ms. Lozano: Probably taking the time to build the proper foundation; understanding the critical aspect of having a website up and running and strong, having all of your internal documents in place, having all of your strategies on paper and setting goals so that they are in front of you. I think, strategically, I have learned the most from previous experiences.

CEOCFO: How is business?

Ms. Lozano: Good! Business is very good!

CEOCFO: Why should investors and people in the business community pay attention to Advisional? What makes you an exceptional company?

Ms. Lozano: Our people. Our people make us an exceptional company, because we deliver services. We also have a product, but the value that we bring comes with the services of those products. Therefore, our people are our key differentiator.



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