



ceocfointerviews.com
All rights reserved!
Issue: October 10, 2016

CEOCFO Magazine



Software Support and Consulting Services for ERP and Communication Software Products used in Healthcare, Government, Education, Retail and Hospitality



Jamie Bails
Chief Executive Officer

Bails & Associates, LLC
www.bailsllc.com

Contact:
Jamie Bails
724-749-4143
jamie.bails@bailsllc.com

Interview conducted by:
Lynn Fosse, Senior Editor
CEOCFO Magazine

“The thing that I am most proud of is the consultants themselves. They make the company. Everything that they do every single day contributes towards our good reputation.”- Jamie Bails

CEOCFO: Ms. Bails, what is the idea behind Bails & Associates?

Ms. Bails: We provide consulting support services for clients who purchase ERP products and communication software products.

CEOCFO: Who is turning to you for services? At what point in time might they reach out?

Ms. Bails: We primarily provide support for Infor, a software company delivering business applications nationally and internationally. Bails specializes in the Human Capital Management, Financial Management and Supply Management products which Infor added to their portfolio with the acquisition of Lawson Software in 2011. We also install and support communication products offered by Spök, formerly Amcom Software.

CEOCFO: What are some of the challenges with both Lawson and Spök that you are able to help clients with and perhaps help in a more efficient way than others?

Ms. Bails: We are able to partner with clients to dig out their business requirements, identify the things that they would like to see improved, lay out their current and future state business processes, and provide both training and support for the clients. This support continues as the client learns the new package, performs product set up, performs testing, and goes live with the product. Once they are live on this product we can provide them with ongoing support, helping them with upgrades, product extensions, new functionality, reporting services, and anything else related to these products.

CEOCFO: Do most people come to you at the beginning when they are starting with a product or do people often not understand the need for a company like Bails?

Ms. Bails: We have a wide variety. We have some clients who come to us at the very beginning when they are ready to engage a partner to help them implement the product. We have other clients who come to us after they have experienced less than optimum results when they either try implementation on their own or partner with a different firm. We also have clients who have been on the system for many years and are attempting to add functionality or improve processes or system use; they are looking for consultants who have expertise in their target areas. One of our biggest clients is Infor, the vendor, themselves. We are an extension of their services arm, providing top consultants to supplement their services team on implementations, upgrades and expansions.

CEOCFO: What are some of the challenges in staying ahead of any software product?

Ms. Bails: One of the big issues is that software vendors in today's marketplace try to be all things to all clients and accommodate many different needs. Clients have many different hardware systems and many combinations of product

usage. The more flexible the vendors try to be the more the variety of combinations increases exponentially. Therefore, trying to support all of the combinations that a client might have gets to be challenging. However, we do invest in education, sending our consultants through a great deal of training. We have a North Star Program internally where we assign a North Star Guide to someone who has just learned a specific new skill. The Apprentice is a very senior consultant in their product area but needs some care and feeding in the new skill area. The Apprentice will work in conjunction with a North Star Guide who directly supports them through their first engagements following training. Sending someone to a training class is easy. However, this program allows you to have sort of a mentor on steroids. We use a very specific and focused program where you have a person who is specifically making sure that you have what you need to be successful learning and using the new skill that you have acquired. We also have an official partnership with the vendors, so they support us a great deal and they are able to help us when we get stuck on something. They are able to educate us, support us and work together with us on those occasions when we hit something that that we cannot solve. But we have many senior folks who independently solve just about anything; we have consultants on staff who can do amazing things with the products.

CEOCFO: *Why Spök? Is there a deliberate reason you chose to make an alliance with them or opportunistic?*

Ms. Bails: It was more opportunistic in that we had good relationships with Infor resources who migrated to Spök. We had earned a very good reputation in the Infor space as a good, solid partner. Therefore, when Spök decided to enlist services partners, they invited us to join their partner ecosystem. We have enjoyed a great relationship with them ever since. It is a relatively small part of our practice but we have regular meetings where we monitor and try to anticipate, based on their pipeline, what they may need. We do all of our work there as a Spök subcontractor. We do not sell directly to their client base. They have a very large presence in healthcare companies and in public sector companies, which are two large, successful verticals for Infor as well. Therefore, it is a nice marriage since our resources had deep experience in the same verticals. Our Infor installers were easily cross trained to be in installers for the Spök products.

CEOCFO: *How do you attract the crème de la crème?*

Ms. Bails: I have been a consultant. I grew up career-wise as a consultant. Knowing the advantages and pitfalls of the consulting lifestyle, we try to take care of our consultants the way that we wanted to be taken care of when we lived 'on the road'. We try to think of the things that a road warrior worries about and the obstacles that they have. We try to accommodate those things as best we can. We try to fight for workable schedules for them. We try to fight for remote access whenever possible. We try to give them some benefits that other firms don't offer. For example, we are the only consulting firm that I know of who provide a sabbatical program. We encourage people to take a nice chunk of time off to reduce burnout. We do not really lose consultants very often. The only consultants who ever really resign do so because they do not want to travel any longer. We do not really lose folks to competitors. Our retention rate is pretty phenomenal!

CEOCFO: *What is your geographic reach today?*

Ms. Bails: At this time, ninety five percent of our work is US based and it is across the country. We have resources who live in thirty three states and we do business in more than thirty states at any given time. All consultants work remotely or fly to their client locations. We perform some work internationally in the Americas, the Pacific Rim, Australia, the Middle East, and Europe.

CEOCFO: *What is next for Bails & Associates?*

Ms. Bails: We are looking at a few other clinical packages which complement our deep healthcare experience. We are looking at expanding our assistance to the Infor sales organization, providing more sales support and co-marketing / co-branding with Infor. We enjoy a great relationship with the Infor executives and the Infor sales team and we plan to do more to encourage businesses have a look at the product. We are also diving much deeper into assisting clients to manage the organizational aspects of embracing new technology.

CEOCFO: *Why is now the time to expand the relationship?*

Ms. Bails: We traditionally were part of the Delivery Partner Program, the services partner program, where we provided services to Infor clients, assisting them in the use of their products. In the past year we graduated and took on the responsibility of becoming an alliance partner with Infor to try to educate and promote the products among the existing client base. Now we are working toward spreading the word about the products into the marketplace, attracting new interest in the Infor product offerings. It is a more strategic way of looking at things, adding value into the ecosystem and growing the client base rather than just being on the receiving end of services. Our investments have really started to take off as we started to commit more marketing dollars to promoting the product and investing in training. We have invested a lot of money now in training our sales people and in training our consultants on some of the new products that Infor is

bringing to market. Therefore, I would say that we have gone from being reactive and playing catch to trying to be more proactive and bring more business to the table.

CEOCFO: *What do you like about Infor? Why have you chosen to be involved with it and with Lawson for so long?*

Ms. Bails: I grew up as an HR consultant. I used to love that you could set up and manipulate the products to do just about anything that you could possibly need. The legacy Lawson products are very flexible and they do a whole lot. I have been married to them ever since! We have seen lots of products over the years. However, no other products in the marketplace can do what our consultants can make these Infor products do. I have seen other products like SAP and Oracle / PeopleSoft and they are not nearly as flexible. I have seen products like Workday and, although they demo really well, there just isn't much substance behind the scenes. They are not nearly as well vetted and tested as the Infor products. I just love the magic that you can do with the Infor products.

CEOCFO: *You do some work with government and education. What have you learned about the non-profit experience that enables you to navigate it better than most?*

Ms. Bails: These clients have limited budgets and there is powerful pricing pressure as well as intense scrutiny on every dollar spent, as there should be. There are often very long sales cycles as there is a long product selection process. But once you do a good job for a school, a city, a state, an agency etc. it adds to your credibility and the road gets a little easier. This is because you have the right kind of experience and clients like to do business with people who understand their industry and their core business needs. Relevant experience does increase your chance of being awarded the work as the clients' value firms that can bring specific experience to bear. Education is very different from a city and a city is very different from an authority and an authority is very different from a utility company and that is very different from a state organization, an agency or even a federal contract. You have to be very flexible. You have to be very patient. You have to be very good. Non-profits do not have a lot of patience or excess dollars to spend on folks who do not know what they are doing. We are really proud of the reputation we have earned over the years in this space.

CEOCFO: *Why choose Bails & Associates?*

Ms. Bails: The thing that I am most proud of is the consultants themselves. They make the company. Everything that they do every single day contributes towards our good reputation. If there is a problem, we do everything that we can to make things right. We proactively evaluate situations to try to head off issues. We react very quickly to issues that do occur and take every single client very seriously. I think that our clients trust us and we have built our business on referrals. Our people really make us special.

Bails
& Associates, LLC