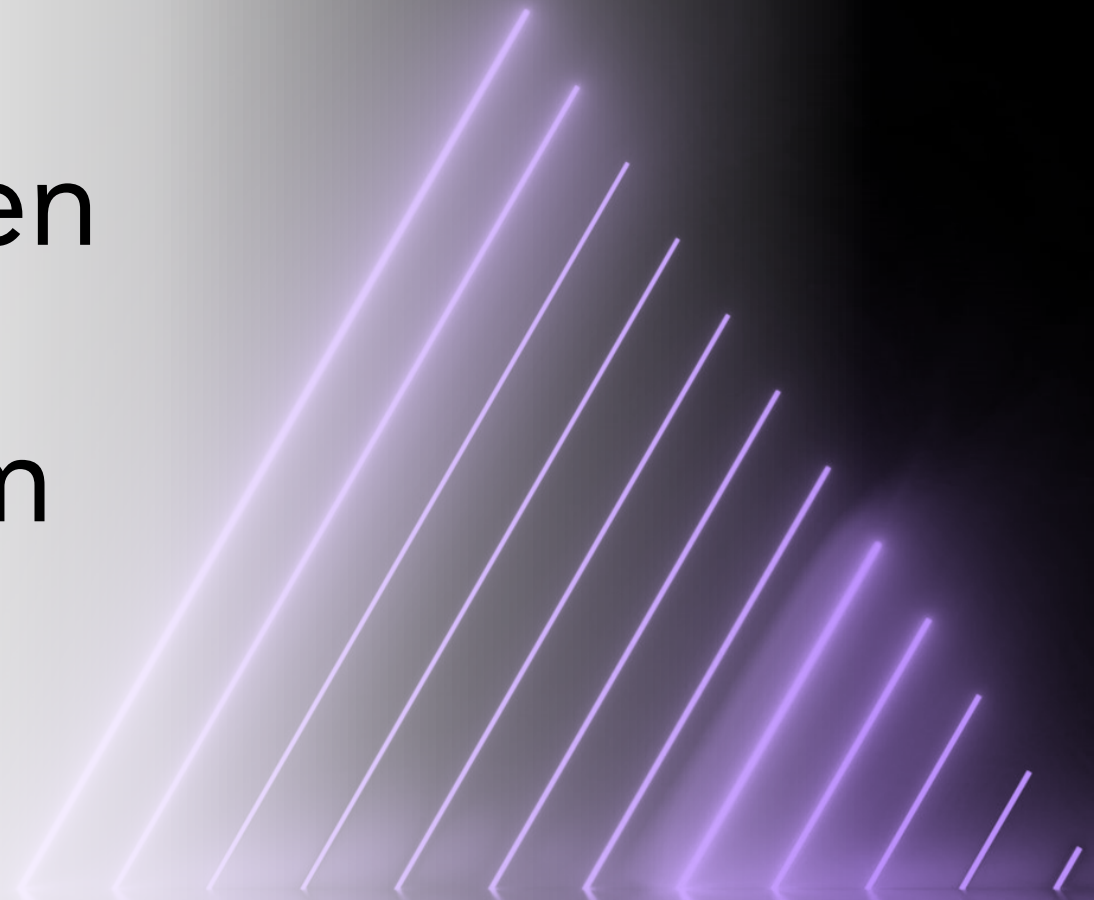




# How to Know When to Upgrade Your Accounting System



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## Michael Marinaro, CPA, MCTS

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Michael Marinaro is a partner in Gross Mendelsohn's Technology Solutions Group. With years of experience consulting with clients on ERP software, Michael enjoys helping businesses save time and increase efficiencies by integrating systems together.





# About Gross Mendelsohn

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- Provides accounting software, networking solutions and cyber security consulting services for businesses
- More than 25 years of experience providing realistic and honest guidance to various industries
- Firm established in 1960
- Technology division in existence since 1990s
- Led by CPAs and seasoned technology professionals





# About Gross Mendelsohn

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- NetSuite Authorized Solution Provider as well as Microsoft Gold Cloud Solution Provider
- Independent view – we work with multiple products
- Can tap into the tax, accounting and investment resources available within Gross Mendelsohn
- Pride ourselves on providing outstanding client service



 **GROSS MENDELSON**  
ACCOUNTING | TECHNOLOGY | WEALTH ADVISORY

# Challenges with Accounting Systems

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# Business Processes

- Fractured systems
  - eCommerce, expense management and CRM systems not integrated
- Manual processes
  - No AP automation or AI-enhanced business processes
- Missing mobile/remote access
- User interface is difficult to use and/or takes too long to process transactions
- No partner access to information
  - Customer portals, vendor remittance information, etc.

# Analytics and Reporting



No access to real-time dashboards/reporting



No AI to help analyze transactions



Siloed data

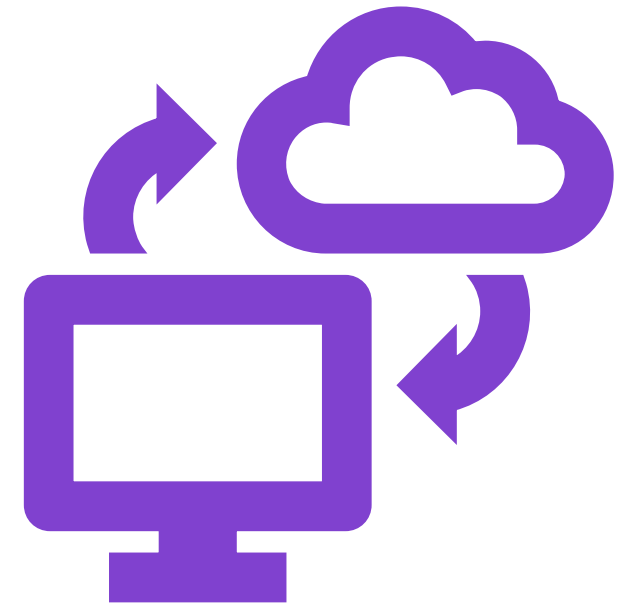
# Compliance and Support

- Not compliant with current rules or regulations
- Only runs on unsupported operating systems
- No longer supported by software vendor
- Vendor no longer investing in new features



# Other System Items

- Too many customizations
  - High maintenance, lack of knowledge on the systems, etc.
- Get rid of on-premise server hardware
  - Corporate move to the cloud



# Upgrade, Add-On or Replace?

# Upgrade or Purchase Add- On Software



Less disruption to business,  
possible better management  
buy-in



Integrations will continue to  
work in most cases

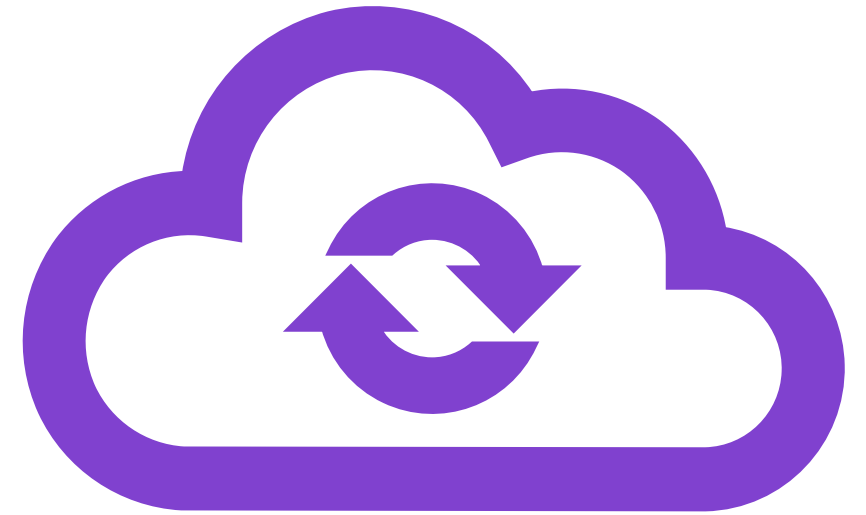


Take advantage of support  
for newer technologies

# Replace

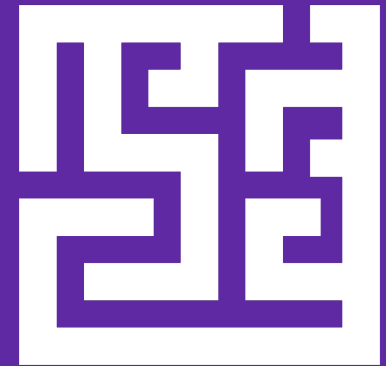
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- Achieve major tech advancements
- Reduce complexity
- Cloud solutions
  - Lower IT costs and complexity, any device/anywhere access, upgrades and new capabilities pushed transparently

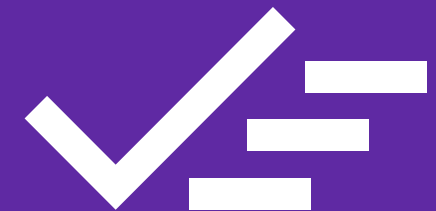


# Enterprise Resource Planning (ERP) System Evaluation Best Practices

What problems are you trying to solve?



What opportunities can you take advantage of?



What reporting/forecasting capabilities are you looking for?





Are there new rules/  
best practices for finance or  
operations to follow?  
(i.e., new lease standard)



Does the system have new CRM/marketing capabilities?



What is the implementation plan for upgrade vs. replacement?





Scan the QR code  
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Q&A



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# Contact Me

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Michael Marinaro, CPA, MCTS



[mmarinaro@gma-cpa.com](mailto:mmarinaro@gma-cpa.com)



410.598.9135



Gross Mendelsohn's Technology Solutions Group  
Baltimore, MD | Fairfax, VA