WINDOWS SMALL BUSINESS SERVER 2003

OUT-OF-THE-BOX ROI FOR SMALL BUSINESSES

Abstract

Small business owners face constant pressure to do things faster, better, and cheaper. Technology investments allow little margin for error. New IT solutions not only have to be simple to install, operate, and maintain but they must start paying for themselves straight out of the box. For emerging businesses, return on investment (ROI) is not a mathematical abstraction; it is a matter of survival. This white paper describes a survey of 25 United States–based users of Microsoft Windows Small Business Server 2003 and quantifies their ROI through both traditional valuation methods and through their user experiences. The results clearly demonstrate that Microsoft Windows servers deliver the simplest affordable network solution for small businesses.

Overview and Summary

Adoption of productivity-enhancing server technology by small businesses has been hampered by concerns about costs, security, and complexity. Windows Small Business Server 2003 was designed to address these issues head-on. The result is a full-featured, multipurpose network operating system that provides small businesses with all the great features the big guys use—e-mail, secure Internet connectivity, business intranets, remote connectivity, support for mobile devices, file and printer sharing, backup and restore capabilities, and an application platform for collaboration—at an affordable cost with none of the hassle.

Available in two editions—Standard and Premium—Windows Small Business Server 2003 has everything that businesses with fewer than 50 PCs need to secure their networks and communicate and collaborate, both internally and externally. The Standard Edition includes Windows Server 2003; Microsoft Exchange Server 2003; Windows SharePoint Services, and the Microsoft Shared Fax Service. The Premium Edition includes everything in the Standard Edition plus Microsoft Internet Security and Acceleration (ISA) Server 2000, Microsoft SQL Server 2000, and Microsoft Office FrontPage 2003.

To quantify how Windows Small Business Server (SBS) 2003 is providing benefits to early users, Lawrence Associates LLC conducted business value studies at 25 businesses over a three-week period in August and early September 2003. This user survey produced dramatic findings. Although Windows Small Business Server 2003 is new, customers are extremely pleased with the advantages and value they have achieved as a result of deploying the product. They are also very enthusiastic about the future potential value and advantages they will realize. For the small and midsize companies surveyed, Windows Small Business Server 2003 is providing:

- **Exceptionally high return on investment (ROI)**
  ROI for the surveyed companies averaged 947 percent and ranged from a low of 63 percent to a high of more than 2,000 percent.

- **Virtually instant payback of costs**
  Many companies recover their software investment in less than one month. Most were able to recover their hardware and software investments in less than 2.5 months.

- **Improved customer responsiveness**
  Many customers stated that they expect an increase in revenue because of the ability to respond more quickly and more effectively to customers as a result of SBS 2003.

- **A complete, affordable network solution**
  The unique package of technology and innovative management tools in SBS 2003 enables small-business customers and technology providers to instantly create a faster and more efficient business environment straight out of the box.

- **The ability to be 20 percent more productive**
  The surveyed companies say their employees can now perform an average of 20 percent more revenue-producing tasks.

- **Improved quality of life**
  Though not quantifiable in financial terms, many respondents cited the ability to do business securely from wherever they happened to be—at home or on the road—while knowing that their data is protected as a major benefit of using SBS 2003.

Finding the Business Value

Virtually all the companies surveyed reported that deploying Windows Small Business Server 2003 had already led to dramatic gains in business value, as reflected by:

- Increased responsiveness to customer needs and requirements
- Improved productivity through reduction in task work and increased output
- Additional time to focus on core business issues, and not on disruptions caused by IT infrastructure failures or security breaches

Value was further expressed in terms of the impact in the ability to protect and increase revenues and the ability to avoid and reduce costs.

Surveyed customers pointed in particular to four key benefits enabled by Windows Small Business Server 2003:

1 Ease of setup and operation of SBS 2003

Windows Small Business Server 2003 was designed to make setup and operation a snap. Whether companies have several technical people who can handle administrative duties in addition to their usual jobs or farm out administration to a services organization, they will find that administrative tasks have been greatly simplified. Windows Small Business Server 2003 includes management tools that administrators can use remotely. For end users, the product suites include client tools that let users access the suites' features from connected desktops or from the Web.

W&E Baum is a small family business of about 20 people specializing in the production of donor walls, trees of life, awards, and plaques. The company was pleasantly surprised to discover that setting up Windows Small Business Server 2003 took far less time than anticipated.

"We've installed and upgraded lots of older versions of Small Business Server so we planned for as much as a week for installation," said Marc Harrison, who handles technology for Baum. "We were thrilled when we came in on Sunday and had everything up and running in three hours. The company was open for business on Monday."

The remote management feature enables W&E Baum's technology services partner to receive a daily health report for proactive management of the client system, while many things can be easily handled by Baum without the partner's assistance.

In the past, Baum had been uncomfortable allowing access to employees and exposing the company to potential viruses. Because of the improved reliability and security of Windows Small Business Server 2003, the company has now created a portal that lets customers make changes to their orders over the Internet.

2 Automatic protection of the IT infrastructure

Windows Small Business Server 2003 is built on Microsoft Windows Server 2003, the operating system that has increased available services by 275 percent while mitigating attacks against the server by 60 percent. Wizards simplify security settings and help to make sure that all the necessary security steps are taken. Windows Small Business Server 2003 includes an internal firewall and also supports external firewalls. In fact, Windows Small Business Server 2003 contains tools that protect your business automatically.

Increased confidence in the IT infrastructure represented 12 percent of the identified benefits in the survey. The increased stability and security of Windows Small Business Server 2003 leads to a

reduction in IT issues, allowing for savings in IT support expenses. It also reduces distractions precluding key employees from attending to core business issues.

The Center for Health Training is a health and human services consulting and training firm with 20 desktops providing research, training, and technical help to public health agencies in the Northwest.

IS manager Roberta Laird identified many examples of how the Windows Small Business Server 2003 data-protection features are saving the company money. The Volume Shadow Copy feature has led to a 2.5 man-day reduction in rework of lost documents per year. System reliability has reduced the need for service calls and the tape backup is saving $1,000 a year in support costs. The elimination of server reboots saves 20 employees ten minutes per week. The company has seen a 50 percent reduction in IT management time and costs (down from four to two hours per month of consulting fees at $95 per hour) and of internal support time (down from four to two hours per month).

3 Employees can perform more revenue-producing tasks

Windows Small Business Server 2003 comes loaded with dozens of productivity enhancement tools that enable employees to find and share documents easily, collaborate on projects, automate many routine tasks, and access the workplace remotely. Productivity gains represented 82 percent of the identified benefits.

Before deploying Windows Small Business Server 2003, **The Fischer Group** was bogged down in paperwork. To make sure that accurate information was available to handle customer inquiries, the food services industry manufacturer's representative kept copies of all pieces of paper supporting every transaction, including purchase orders, acknowledgements, and customer notes. As a result, document management involved handling the same documents repeatedly and required personnel whose primary task was to manage the large volumes of paper files. Files were accessible only during business hours (8:00 to 5:00), and employees who needed a particular document could just hope that it was in the right place.

General Manager Gene Austin anticipates that using Windows SharePoint Services, a preconfigured internal Web site solution that serves as the central repository of all project information—documents, contacts, tasks, discussions, and more—will save the company 15 to 20 percent of the time spent going to file cabinets, searching for, and retrieving information. The ability to share documents electronically will help facilitate customer inquiries and help make sure that the company is always on top of its orders, has information at its fingertips, and can support additional business from its customers.

4 Increased customer responsiveness

Windows Small Business Server 2003 enables small businesses to reach more customers and service them better. Improved customer responsiveness represented 6 percent of the identified benefits and is anticipated to lead to both retention and generation of revenues. Increased customer responsiveness resulted from better internal access to shared data and remote access/mobility.

C&S Sales is a marketing collateral and promotions company. The key to expanding its customer base is the ability for its outside sales representatives to work on custom orders with existing and prospective customers. Custom orders drive larger order size and higher margins. Its sales organization is set up in teams with inside customer-service representatives (CSRs) assigned to outside sales reps.

Before the deployment of Windows Small Business Server 2003, and specifically its Windows SharePoint Services capabilities, C&S's outside sales reps were spending too much time on order replenishment and fulfillment transactions. Their CSRs were also inundated with the paper and tasks associated with order-fulfillment transactions. By deploying SharePoint Services and developing a self-service collaborative environment between their customers, outside sales, and inside customer

service reps, C&S eliminated the need for the outside sales reps to handle the replenishment and fulfillment transactions and reduced the time CSRs spend on fulfillment transactions by 30 to 40 percent. This translated into multiple benefits for C&S and its customers. Customers' orders are now filled sooner, thus improving customer responsiveness, and the sales teams can now focus on the larger, custom high-margin orders. The company expects that these benefits will equate to an increase in sales of approximately 5 percent and an avoidance of costs of between $15,000 and $20,000 per CSR per year.
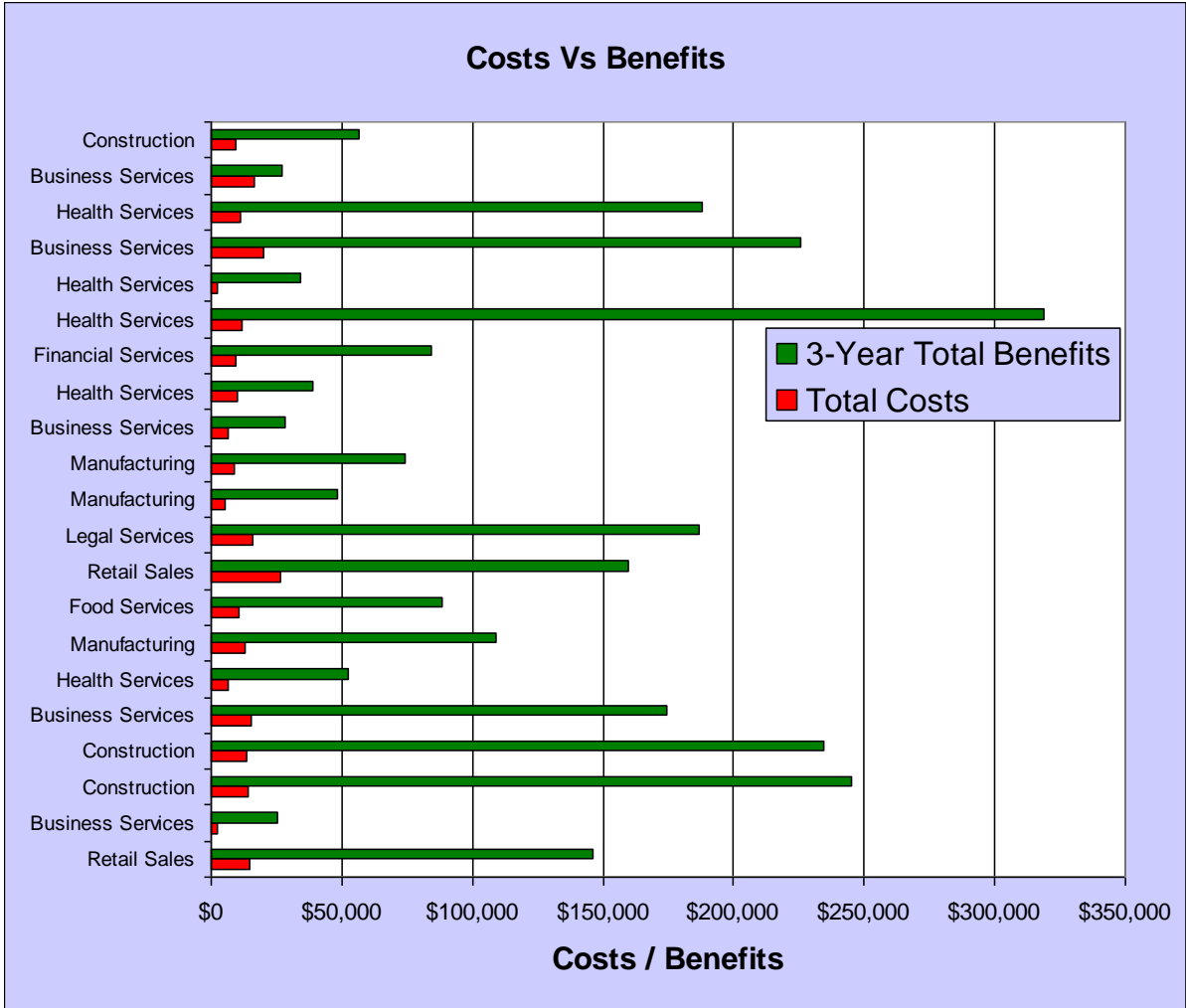
Detailed Results Summary and Analysis

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	Total Company			Per User		
	Average	Minimum	Maximum	Average	Minimum	Maximum
Number of Users	20	4	45			
Software Costs (Server and Client Access Licenses)	$2,003	$419	$3,995	$104	$88	$173
Total Costs (Investment)	$11,651	$2,357	$26,396	$626	$315	$1,448
Total Annual Benefits	$40,409	$8,372	$106,186	$2,113	$410	$5,366
Total Three-Year Benefits	$121,227	$25,116	$318,559	$6,338	$1,230	$16,099
Net Benefit	$109,576	$10,499	$306,850	$5,712	$477	$15,342
ROI (Three-Year Net Benefit / Total Costs)	947%	63%	2,621%			
Payback Period Based on Software and Hardware Costs (Months)	2.4	0.5	11.3			
Payback Period Based on Total Costs (Months)	4.9	1.3	22.0			

- Analysis includes three years of benefits. We believe that, on average, customers will benefit from SBS 2003 for more than three years.
- "Total Annual Benefits" include all expected (not potential), incremental, easily quantified benefits. This study did not include benefits that were possible with the customer's prior environment—only benefits that are enabled by new Windows Small Business Server 2003 capabilities/features.
- "Total Costs (Investment)" includes all incremental hard and soft costs necessary to purchase, install, support, and use Windows Small Business Server 2003.
- Costs and benefits were not discounted to adjust for the time value of money to simplify the analysis. We do not believe this has a material impact on the results.
- The average payback represents that number of months before the initial investment was recouped. Payback was calculated using straight-line cash flows. All costs are assumed to occur at the beginning of the project and benefits are spread evenly throughout the three-year life of the project.
- ROI is calculated as follows: (Total Three-Year Benefit – Total Costs) / Total Costs.

Summary of Results by Participant

Participant Industry	Number of Users	Total Costs	Three-Year Total Benefits	Three-Year Net Benefits	Payback Period (Months)	ROI (Net Benefits/ Costs)
Retail Sales	20	$14,913	$146,063	$131,149	3.7	879%
Business Services	4	$2,357	$25,116	$22,759	3.4	966%
Construction	30	$14,258	$245,109	$230,851	2.1	1,619%
Construction	30	$13,744	$234,563	$220,818	2.1	1,607%
Business Services	35	$15,610	$174,656	$159,046	3.2	1,019%
Health Services	8	$6,369	$52,594	$46,225	4.4	726%
Manufacturing	40	$13,152	$109,013	$95,860	4.3	729%
Food Services	20	$10,509	$88,594	$78,085	4.3	743%
Retail Sales	45	$26,396	$159,891	$133,495	5.9	506%
Legal Services	30	$16,058	$186,722	$170,664	3.1	1,063%
Manufacturing	5	$5,186	$48,265	$43,079	3.9	831%
Manufacturing	15	$8,558	$74,363	$65,804	4.1	769%
Business Services	10	$6,261	$28,125	$21,864	8.0	349%
Health Services	18	$9,850	$38,914	$29,064	9.1	295%
Financial Services	15	$9,535	$84,375	$74,840	4.1	785%
Health Services	20	$11,709	$318,559	$306,850	1.3	2,621%
Health Services	8	$2,521	$34,116	$31,595	2.7	1,253%
Business Services	14	$20,268	$225,389	$205,121	3.2	1,012%
Health Services	22	$11,313	$187,922	$176,609	2.2	1,561%
Business Services	22	$16,563	$27,063	$10,499	22.0	63%
Construction	15	$9,535	$56,363	$46,828	6.1	491%

Costs Vs Benefits

Horizontal bar chart titled "Costs Vs Benefits" showing 3-Year Total Benefits (green) and Total Costs (red) by industry. Y-axis categories (top to bottom): Construction, Business Services, Health Services, Business Services, Health Services, Health Services, Financial Services, Health Services, Business Services, Manufacturing, Manufacturing, Legal Services, Retail Sales, Food Services, Manufacturing, Health Services, Business Services, Construction, Construction, Business Services, Retail Sales. X-axis "Costs / Benefits" from $0 to $350,000 in $50,000 increments.

Results by Value Type

	Total Company			Per User		
	Average	**Minimum**	**Maximum**	**Average**	**Minimum**	**Maximum**
Quickly Set Up and Easily Operate	$2,294	$0	$11,859	$114	$0	$441
Automatically Protect	$2,475	$0	$14,063	$178	$0	$851
Enable Employees to Get More Done	$33,022	$4,688	$87,500	$1,639	$227	$4,375
Reach More Customers and Service Them Better	$2,619	$0	$50,000	$182	$0	$3,571
Total	**$40,409**	**$8,372**	**$106,186**	**$2,113**	**$410**	**$5,366**

Benefit Comments
- For some study participants, benefits included expected benefits, not just benefits experienced to-date.
- All benefit data came directly from the study participants. In some cases Lawrence Associates encouraged the interviewee to provide more conservative data. In no cases did Lawrence Associates add in or increase benefits.
- Benefit was calculated by determining the net savings or increase in profits to the company. For organizations that recognized an increase in revenues, the return on investment was calculated based on margin as opposed to gross revenues. The margin used was 10 percent of revenues.

Results by Benefit Type

	Total Company			Per User		
	Average	**Minimum**	**Maximum**	**Average**	**Minimum**	**Maximum**
Team Collaboration (Windows SharePoint Services)	$10,884	$0	$46,406	$515	$0	$2,367
Mobility and Remote Connectivity	$9,440	$0	$56,250	$497	$0	$2,813
E-mail (Outlook / Exchange)	$8,596	$0	$70,313	$408	$0	$2,344
Access to Shared Information and Equipment	$4,102	$0	$29,531	$219	$0	$1,477
Revenue Increase (Profits On)	$2,619	$0	$50,000	$182	$0	$3,571
Availability and Reliability	$1,883	$0	$14,063	$157	$0	$851
IT Management / Support	$1,330	$0	$7,594	$57	$0	$330
Non Productivity Cost Savings	$963	$0	$6,000	$58	$0	$300
Security and Privacy	$592	$0	$10,500	$21	$0	$350
Total	**$40,409**	**$8,372**	**$106,186**	**$2,113**	**$410**	**$5,366**

Average Annual Benefits

- IT Management / Support, $1,330, 3%
- Non Productivity Cost Savings, $963, 2%
- Security & Privacy, $592, 1%
- Availability & Reliability, $1,883, 5%
- Revenue Increase (Profits on), $2,619, 6%
- Access to Shared Information and Equipment, $4,102, 10%
- Email (Outlook / Exchange), $8,596, 21%
- Mobility & Remote Connectivity, $9,440, 24%
- Team Collaboration (SharePoint), $10,884, 28%
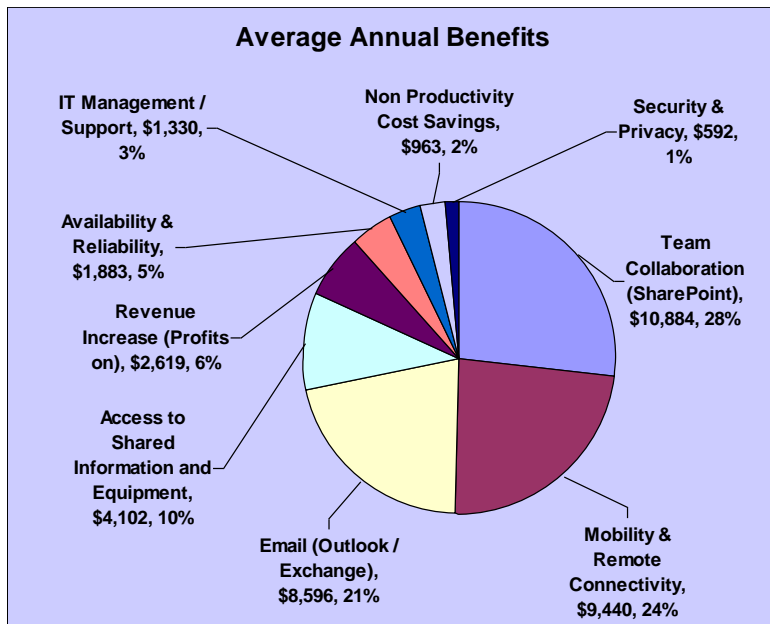
Team Collaboration (Windows SharePoint Services)

Windows SharePoint Services provide a centralized location for users to easily work together and share documents. For example, users can post documents into shared document libraries, view the company's vacation calendar, enter a request to the Help desk, and participate in a survey or discussion group. With Windows SharePoint Services/Meeting Workspace, users can share real-time documents and meeting materials.

Key Enablers: Windows SharePoint Services

Summary of Findings: Windows SharePoint Services offers huge benefits because it provides a centralized location for employees to find out what is going on and provides a portal for collaboration and communication with customers and internal departments. Being able to create individual Windows SharePoint Services portals also improves centralized documentation pertaining to business units. Windows SharePoint Services was not included in Microsoft Small Business Server 2000.

Mobility and Remote Connectivity

Remote connectivity provides remote access to shared network resources, e-mail, and desktop using Internet-enabled computers or mobile devices. Users can connect securely through a VPN connection or through Outlook Web Access.

Key Enablers: Remote Web Workplace; VPN

Summary of Findings: Complex VPN setup is no longer required with the Remote Web workplace. In addition to e-mail, companies can now use a variety of features remotely, all with two clicks: "Connect to desktop" and "Computer Name."

E-mail (Outlook/Exchange)

Internet e-mail based on Exchange Server 2003 provides a messaging solution for Internet and intranet e-mail and integrates with Microsoft Office Outlook 2003 for scheduling meetings or having online conferences. In addition, Exchange Server 2003 provides users with remote Web access to e-mail, scheduling, and contacts through Outlook Web Access.

Key Enablers: Outlook—Reading Pane, pop-up announcements, improved layout, SmartFolders, thread compression, adaptive junk e-mail control; e-mail access and usage control (prevent a recipient from forwarding, printing, editing, and extracting message content); enhanced user permissions (Information Rights Management); Exchange Server 2003

Summary of Findings: Reduced time managing, organizing, and reading e-mail; reduced time managing e-mail/document security (less need for voice and face-to-face meetings; less time reacting to information leaks)

Access to Shared Information and Equipment

This feature enables company users to store and share information about network drives. It also provides the capability to access/share printers, fax services, and other network resources.

Key Enablers: Shared Files/Folders; SQL Server 2000 available in the Windows Small Business Server 2003 Premium Edition.

Summary of Findings: Files and folders readily accessible; improved communication between locations; increased speed of the system.

Availability and Reliability

The Windows Small Business Server 2003 backup solution helps companies easily and successfully back up their servers and guides them through the restore process, ensuring the success of their backup strategy. The backup solution prompts the administrator to create a backup strategy and leads them through the process of deciding what to back up, when to perform backups, and where to store the backup information. By default, it backs up all the data on the server that is needed to completely restore that server.

Key Enablers: Volume Shadow Copy Service and Backup Configuration Wizard

Summary of Findings: No data losses since the installation of Windows Small Business Server 2003; not having to restart the server three to four times each week prevents downtime; will save dollars used to purchase backup software from third-party application vendors.

IT Management/Support

Windows Small Business Server 2003 provides enhanced tools to monitor server activity and receive performance and usage reports in e-mail or online. Most important, the server and client workstations can be monitored remotely.

Key Enablers: Remote monitoring and control; advanced security; preconfigured management consoles; firewall; backup and restore; Active Directory, Software restriction policies, Client Setup features/wizards

Summary of Findings: Improved ongoing maintenance of server (setup, monitoring, security, and other tasks); improved ongoing maintenance of client PCs (monitor and control usage, install software, resolve issues, set up client PCs, add users, and more); performance reporting feature—excellent for IT personnel. Usage reporting with Windows Small Business Server 2003 is excellent and was lacking in previous versions.

Nonproductivity Cost Savings

Nonproductivity cost savings include reduction in IT support costs, reduction in travel costs, reduction in telecommunications costs.

Key Enablers; Windows Small Business Server 2003 Backup Configuration Wizard, Software Restriction Policies, system reliability, remote access.

Summary of Findings: Significant reduction in IT support costs; reduction in travel and telecommunication costs

Revenue Increase

This category is used to capture the potential improvement to revenue resulting from efficiencies gained by having a cutting-edge IT infrastructure. An efficient IT infrastructure can help companies focus on their business and profit growth instead of trying to solve IT disasters.

Key Enablers: Better access to information (Shared Folders), improved communication/coordination (Exchange, SharePoint Services).

Summary of Findings: Quicker response to customer inquiries—increase in revenue resulting from the capability to respond more quickly to customer needs; productivity efficiencies helps company employees spend time on marketing and gaining new customers
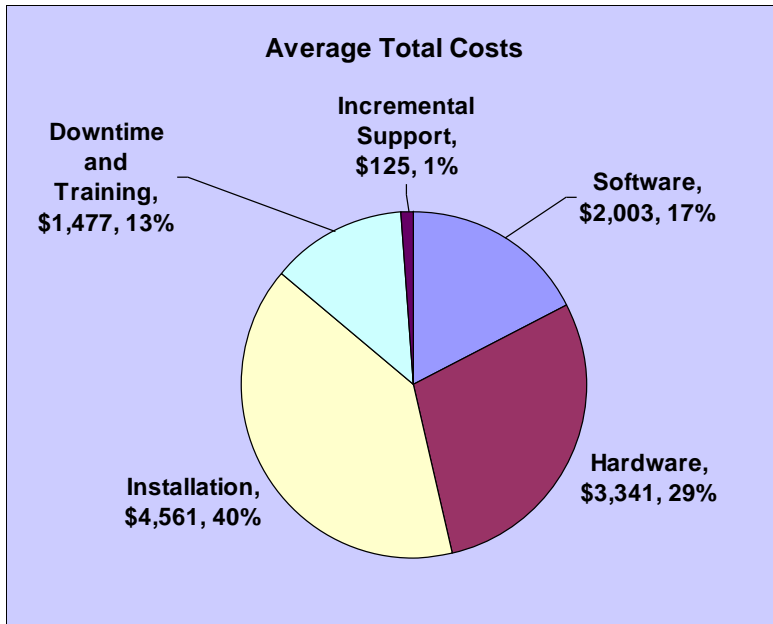
Security and Privacy

Windows Small Business Server 2003 provides enhanced features relating to security intrusion, unauthorized use, data loss, and other security and privacy issues.

Key Enablers: Software restriction policies; Outlook security; server firewall; requires Office 2003—Permissions (Information Rights Management) restrict access and usage control (preventing a recipient from forwarding, printing, editing, and extracting document information)

Summary of Findings: The layer of security in the Exchange server results in more secure and easier management of e-mail communications; international and multiple-location businesses can communicate securely; software restriction policies save unauthorized access to company resources.

Costs

	Total Company			Per User		
	Average	Minimum	Maximum	Average	Minimum	Maximum
Software	$2,003	$419	$3,995	$104	$88	$173
Hardware	$3,341	$0	$10,300	$190	$0	$515
Installation	$4,561	$390	$13,050	$248	$43	$743
Downtime and Training	$1,477	$125	$4,688	$76	$14	$156
Incremental Support	$125	$0	$1,160	$6	$0	$65
Total	**$11,507**	**$2,357**	**$23,378**	**$623**	**$315**	**$1,448**

Average Total Costs

- Incremental Support, $125, 1%
- Software, $2,003, 17%
- Hardware, $3,341, 29%
- Installation, $4,561, 40%
- Downtime and Training, $1,477, 13%

Cost Comments

- *Software*
  - o Retail U.S. pricing for Windows Small Business Server 2003 Standard Edition is $599 (including five Client Access Licenses (CALs)). Retail U.S. pricing for Windows Small Business Server 2003 Premium Edition is expected to be $1,499 (including five CALs). Retail U.S. pricing for each additional CAL is $99.
  - o Software cost included was discounted by 30 percent off the base license (the first five CALs) and 15 percent for each additional CAL. Discounts were used because this is a common practice and because the software will frequently be bundled with the hardware at much deeper discounts.
  - o Survey participants did not purchase software, but estimated cost is included to model cost for future customers.
  - o Average U.S. software cost in this study was $1,988.
- *Hardware*
  - o Hardware to run Windows Small Business Server 2003 was included. A couple of companies stated that they did not need any new hardware and were able to install it on existing hardware. Hardware costs frequently included redundancy, tape drives, extra power supply, backup software, third-party software, extra RAM, maintenance agreements, and more.
  - o Several companies required client PC upgrades (RAM) or may have purchased some new client PCs to be able to take advantage of certain features. These costs are included.
  - o In some cases hardware requirements were not known and average costs were used based on the number of users.
- *Installation*
  - o Included costs to install hardware/software, configure the server, configure client PCs to work with the server, customization, and initial troubleshooting.
  - o Included partner time at standard rates and internal staff time investment at a fully-burdened hourly rate.
  - o Total time for the consultant to completely install/customize the system ranged from a couple of hours to more than 50 hours. Internal staff time ranged from no time (for many) to around 50 hours.
- *Downtime and Training*
  - o Included lost user productivity because of downtime during the installation. For most companies this was less than an hour per user.
  - o Included formal and informal user/IT training on the new features of the system. For most participants, this was only a few hours.
- *Incremental Support*
  - o For most companies, incremental ongoing support (usually provided by the installation partner) is less than for their prior environment, so incremental support cost would be zero (it is a cost savings).

Conclusion and Recommendations

The in-depth studies of the companies completed for this report give compelling evidence that a migration to Windows Small Business Server 2003 provides a fast and significant return on investment. With payback periods ranging from 1.3 months to two years and ROI ranging from 63 percent to more than 2,000 percent, small business owners are quickly recovering investments and realizing enormous benefits. Windows Small Business Server 2003 helps smaller firms extend their geographic reach, find new customers, and increase revenues while holding costs steady or decreasing them. Although it is not measurable in financial terms, the study suggests that the "portability" of Windows Small Business Server 2003, which enables small business owners to both work harder and spend more time on family activities, is a compelling factor in the purchase decision.

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AUTHOR BIOGRAPHIES

Lawrence Associates LLC is a premier boutique advisory firm focused on assisting clients to realize maximum value for their capital investments. Its approach to research and analysis is based on formal scientific, analytical, and quantitative methods, and investigations are performed by credentialed, experienced professional analysts.

Andrew Hall has eleven years of broad business experience, including six years as a strategy/management consultant in IT business assessments, business strategy, financial/value analysis, sales/marketing, supply-chain management, business process improvement, product development, and people/project management. Before working with Lawrence Associates, Andrew managed and conducted business value and strategy engagements for Microsoft Consulting Services. Before Andrew's consulting career, he was responsible for strategic planning, marketing, operations improvement, and financial planning at an industrial equipment manufacturer for five years. He has an MBA and a B.S. in mechanical engineering.

Ansa Varghese has thirteen years of experience in the Internet and data communications industry in a variety of positions applying business and analytical approaches. Before working with Lawrence Associates, Ansa was a senior business analyst and product development consultant in the applied research unit of Telcordia Technologies. She provided business guidance, strategy recommendations, and assessed the business implications of new technologies and solutions for profit growth, investment programs, network design and capacity planning for network providers of Internet Protocol–based products and solutions. Ansa has an undergraduate degree in biology and chemistry and graduate education in information technology and financial analysis.

Marge Monaghan has more than 25 years of experience in managing accounting teams in various industries and conducting financial assessments. She has managed the implementation of new accounting systems and developed and documented policies and procedures to optimize best practices around newly implemented systems. For the past three years, Marge has been managing and conducting rapid economic justifications (REJs) and business value assessments for Immedient Corporation and Lawrence Associates.

Input and editorial support provided by:

- Bernie Lawrence, CEO, Lawrence Associates (blawrence@lawrencecrm.com)
- Vince Vecchio, Ph.D., President, Lawrence Associates (vvecchio@lawrencecrm.com)
- Jerry Bowles, Forbes Special Projects (jbowles@verizon.net)