

Celebrating 20 Successful Years in 2021

**COACH**  
TECHNOLOGIES<sub>LLC</sub>



**ORACLE**

Partner

**2021**

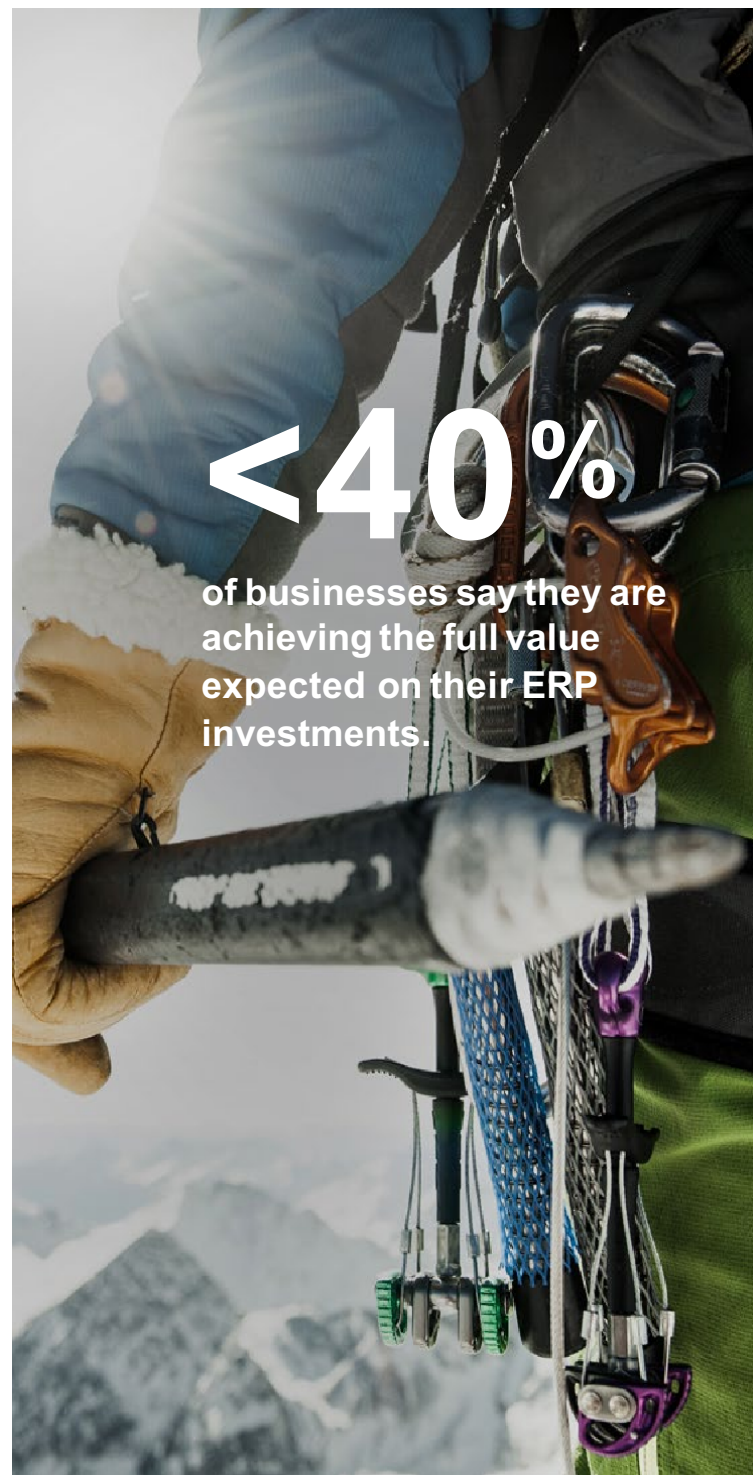
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303-808-5749 [info@CoachTechnologies.com](mailto:info@CoachTechnologies.com) [www.CoachTechnologies.com](http://www.CoachTechnologies.com)

# Preparation

Cloud is the future of most business applications, including ERP. Our CIO survey finds 79% of CIOs believe that cloud is critical to their IT strategy and corporate strategy, and 39% say they are already running a hybrid cloud ERP and reaping its rewards of Total Cost of Ownership (TCO) reduction and increased agility.

Migrating an ERP - the backbone of an enterprise - to the cloud is arguably more involved than migrating an edge system such as customer relationship management, which deals only with one aspect of how an enterprise functions. While adopting the cloud, some organizations will prioritize by separating and migrating some modules or functions to the cloud first (such as human capital management), while the remainder continue to stay on-premise. Other organizations will move a critical mass of their business applications to the cloud, finding little sense in retaining core systems on-premise.

Ultimately, you need help navigating the proliferation of potential risks in these changing times. [Coach Technologies](#) will



help you connect a strategic response to opportunities or threats, with the ever increasing number of pieces of the jigsaw puzzle that make up the world we now live in.

**Where you see risks, we see opportunities.**

# No limits

**Coach Technologies** is a full-service global services provider based out of Denver Colorado, that specializes in comprehensive ERP (Enterprise Resource Planning) software – engaging in the entire process from selecting your software solution, to implementing your solution company wide.

Coach offers a full range of worldwide services which include ERP, PLM, CPQ, and CRM consulting and software integration, as well as training, application and technical management. Coach focuses on small and mid-market companies in manufacturing, pharmaceuticals, retail, financial management, distribution, services, IT, and other industries worldwide. Our consultants have an average of 15+ years' experience working with all types of Enterprise Resource Planning (ERP) software, and they have substantial experience within the industries in which we claim specialization.

Founded in 2001, Coach Technologies has earned the reputation of an intuitive consulting firm, intrinsically understanding our client's needs and intentions. Coach Technologies consultants listen carefully to our clients and respond with creative and fresh perspectives on your solution.



# Focus

**Coach Technologies is an experienced service provider for NetSuite, JD Edwards, PeopleSoft, Oracle, Microsoft Dynamics and Salesforce. Coach offers a wide range of professional services from technical, functional and project management, accommodating full or partial implementations. Coach also offers process redesign, ongoing maintenance, support and training consulting services.**

Coach Technologies boasts a team of consultants with backgrounds as varied as yours. Coach Technologies provides proven CRM, ERP, Reporting, Marketing Automation, Business Intelligence, and Strategic Planning business solutions to mid-market and mid-enterprise customers.

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Coach Technologies is a solution provider for:

**ORACLE**

PeopleSoft

 **NETSUITE**

 salesforce

**JD Edwards**<sup>®</sup>  
Enterprise Software

 Microsoft Dynamics<sup>®</sup>

# Empowerment



# Business Process Management (BPM)

**Empowerment in business** is a management practice of sharing information, rewards, and power with employees. This puts them at the heart of the organization by giving them power and autonomy. When you **empower** employees to step up, make their own decisions and pave their own path to success, you create a better **workplace** culture. Business Process Reengineering involves the radical redesign of core business processes to achieve dramatic improvements in employee productivity, cycle times and quality.

In business process reengineering, Coach Technologies empowers companies to start with a blank sheet of paper and ask their employees, (system users), to rethink existing processes that will help their day to day processes be more productive, and deliver more value to the customer. Coach Technologies helps you adopt a new value system that places increased emphasis on employee and customer needs.

In working with Coach, many companies reduce organizational layers and eliminate unproductive activities in two key areas. First, Coach will help you redesign functional organizations into cross-functional teams. Second, we will help you use technology to improve data dissemination and decision making.

Coach Technologies focuses on:

- Refocusing company values on employees and customer needs
- Redesign core processes, often using information technology to enable improvements
- Reorganize a business into cross-functional teams with end-to-end responsibility for a process
- Rethink basic organizational and people issues
- Improve business processes across the organization



## **Business Intelligence Reporting (BI)**

Coach Technologies focuses on:

- Seamlessly integrating data from any application, system, or source across your entire business and beyond, transforming it so it can be utilized across every enterprise, partner, and customer endpoint to drive greater business value.

Enterprise Resource Planning software houses everything from core financial data to production cycle times, consolidating the many facets of your business into a single unified system. As you can imagine, that's an enormous amount of data. In some ways, this massive data pool works to an ERP's advantage. Through Coach's guidance, we can help you maximize analytics dashboards and detailed reports. This abundance of information empowers users to make confident business decisions, offering insight into the interconnectivity of business processes and how they contribute to organizational performance.

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## **Customer Resource Management (CRM)**

Coach Technologies focuses on:

- Salesforce
- Oracle / NetSuite
- Monday.com

Customer Relationship Management (CRM) helps manage customer data. It supports sales management, delivers actionable insights, integrates with social media and facilitates team communication. Cloud-based CRM systems offer complete mobility and access to an ecosystem of bespoke apps. Bespoke apps may take more time to build, but they can solve both existing and future business needs. Businesses have full control over their app's features, it's completely custom built. You have full ownership of the apps content, design and functions from start to finish. Let Coach show you!

## Configure - Price - Quote (CPQ)

Coach Technologies focuses on:

- **PowertrakCPQ**  
PowertrakCPQ is a quoting, guided selling and ordering solution that offers 2D & 3D product configurations with virtual reality and augmented reality experiences.
- **BlueprintCPQ**  
BlueprintCPQ is leading the way in the 'Lead-to-Order' process, helping guide users with personalized and informative content at key buying stages.

CPQ stands for configure, price, quote. It's an extension of your customer relationship management platform (CRM). It makes the sales process easier, faster, and more organized. CPQ solutions are using machine learning to drive outcomes that are required to win deals.

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## Product Lifecycle Management (PLM)

Coach Technologies focuses on:

- Oracle PLM Cloud
- Oracle Agile
- Arena
- Propel

Product Lifecycle Management Software speeds time to market, reduces COGS, increases productivity, automates reviews, increases profits. eliminates manual errors, centralizes product design, connects product teams, and using Coach's guidance, it's easy to use.



# Training

# Training

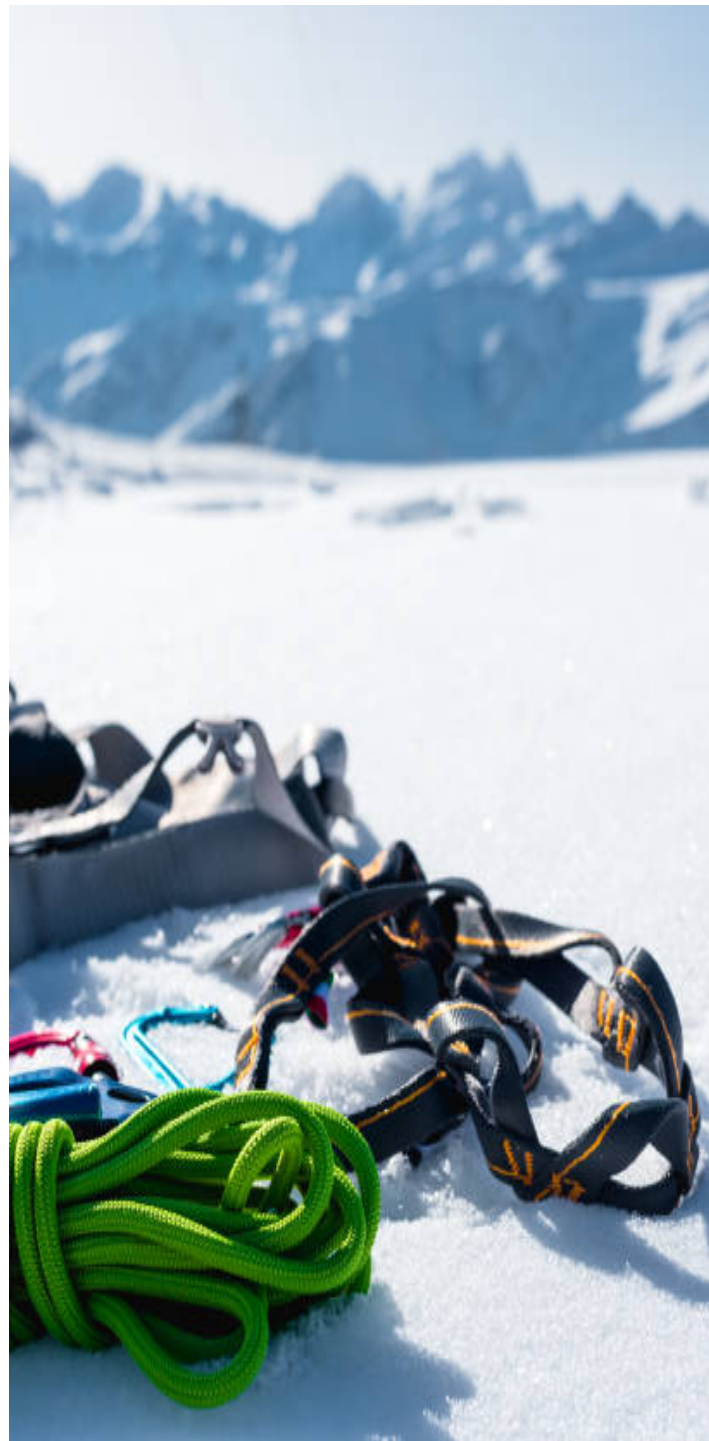
**Coach Technologies specializes in identifying and selecting the best training method for your employees. An ERP implementation done correctly, can lay the foundation for the organization's future growth, improve productivity, and provide a much better bottom line.**

We provide ERP training on a variety of business management software applications. As ERP is a suite of such applications, trainees can choose the right ERP training courses according to their requirements. At **Coach Technologies**, we provide training on the best of ERP software systems, including Oracle, JD Edwards and NetSuite. Whether the learners want to apply an ERP system to manage their human resource management tasks or to manage financial activities within their organizations, we have the right ERP training to offer to all professionals.

Benefits of ERP Course:

While the training on ERP software systems can benefit the specialists in several niches like quality management, supply chain management and plant maintenance, it offers the knowledge of compliance tools and databases that helps in system implementation across industries and organizations.

A single ERP software system will ensure to provide a common database to multiple departments within an organization. This helps in interconnecting all the functions or departments. Thus, all departments can access the same data and records, bringing uniformity in their functioning.



Explore more:  
[www.CoachTechnologies.com](http://www.CoachTechnologies.com)

# Methodology

# Methodology

Our track record stems from a proven methodology built upon diverse real-world experience, investment in deep skills training and talent. Our methodology allows us to conquer any situation and combination of factors when we integrate systems.



Advise

Implement

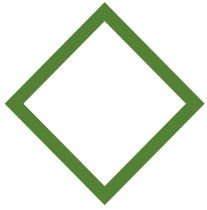
Support

Triple Diamond Methodology

If you're undertaking an ERP implementation project, it's imperative that you realize expected benefits and justify costs. The process is long and complex, but if you know where to look, there are savings to be had – and efficiencies to exploit – right down the line. We see opportunities to avoid pitfalls and incrementally improve your chances of project success, both in the short term and with positive outcomes going forward.

Our **Triple Diamond** methodology not only makes us reliable and dependable but also enables us to deliver projects on time and within the confines of your budget.

# Methodology



## ADVISE

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### Strategy

The first part of any journey is deciding where to go. In cases where customers aren't sure what the best approach is to take, we identify different options and often describe this as the art of the possible. This is where business outcomes and vision are discussed and mapped as priorities through white boarding sessions and interviews with key stakeholders. This is not technical but is translating business value of technical solutions back and forth in order to provide direction for subsequent stages. This strategy stage sets the target of where we're going, but it's not necessarily defined how to get there yet, depending on the complexity of the integration project.

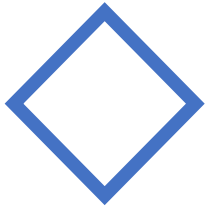
### Definition

The next step of the journey, once you have a destination, is to decide on options to get there. This means taking information from a strategic vision and target outcome(s), and more closely mapping it to capabilities within the actual solution. Very rarely is money 'no obstacle'. This means that decision makers need to understand cost vs. time vs. technology capabilities, as part of a comparative decision making process. This means the business starts to understand the relative nature of an ask, versus finite resources. Once a target outcome is set, with a defined approach, we move to the next stage of our methodology – The Roadmap.

### Roadmap

Now that the destination has been set, and we understand that we're flying first class, we still need to pick an airline. The point of the earlier step is to set a clear definition so that we can budget smartly – without trying to roadmap and budget every option. This means we help an organization create a 3-5 year working short, medium, and long term plan for hardware, software and application. This stage, allows decision makers flexibility for relative course corrections, while understanding gaps and risks in their existing infrastructure and application environment, so they can prioritize investment in technology today.. and budget for tomorrow. Once these three distinct planning exercises are complete, we move to more tactical and traditional implementation phases.

# Methodology



## IMPLEMENT

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### Discover

In the discovery phase of the project, we will conduct an assessment to understand your current environment and needs and identify possible issues and gaps that may affect the successful implementation. We will then guide you through the existing technology options, and help you identify the ideal solution.

### Design

During the design phase of the project, we will work with your team to design the new IT environment tailored to your exact specifications, and, in accordance with vendor and industry leading practices, we will analyze and design for scalability, business continuity, and security. The technology design we craft together, will then be reviewed and validated by our subject matter experts, to make sure the final solution is secure and integrates well with all other existing and planned environments. We will make sure you understand and are comfortable with all the pieces of the new design, and that the final result will serve as a blueprint for the testing and deploy phases of the project.

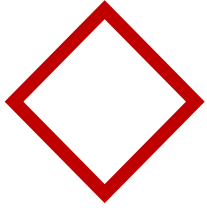
### Testing

Testing is an essential part of the software development life cycle. Our team of expert software testers, will be performing a comprehensive test of the system being developed in different iterations.

### Deploy

The deploy phase of the project will consist of four main stages: build, test, pilot and rollout. We will deploy your new environment in accordance with leading industry standards and best practices. This includes supporting integration with your existing environment, and phasing the roll-out to align with your business needs.

# Methodology



## SUPPORT

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### Support

The maintenance of software is an important aspect of the longevity of your solution. Support and Maintenance starts after the application is deployed into the live server. Coach will help you during post go live support with application or technical issues. We will also be there for any questions that may arise in daily business (“how do I...”). Continuous support is essential to your people and the software.

Coach Technologies commitment to deliver solutions is backed by our reputation in delivering robust ERP platforms to clients by relying on benchmarked software and applications that the industry trusts globally. Our solutions solve complex business needs and problems, aligning solutions with the roadmap of clients to maximize revenues and streamline efficiency.

- Improve productivity and adoption with role-based access to key information
- Gain higher efficiency of existing resources and meet business demands
- Manage client opportunities with customer segmentation and contextual awareness
- Manage overall business risk, lower operational costs and streamline processes

**Our goal is 100% adoption of your solution.**

We offer a full range of services and methodologies, so that we can come up with the *best* methodology for your specific objectives. We have utilized widespread implementation approaches that have proven successful for clients, and we know which ones are appropriate for each business. We recognize that the world is changing, and we pride ourselves on thinking outside of the box to customize and develop the right solutions and methodologies for your needs.

# Our Industry Experience

At Coach Technologies, we understand the importance of knowing our clients' business and their industry. With our vast knowledge and experience, we are able to provide our clients with industry-specific advice related to your business. We provide our clients with a very high level of personal attention to their business which is why our client relationships continue to be successful through the years.

It's great getting our customers' feedback, and we consider it a valuable resource to help us improve our performance and overall business operations. Recognizing and being grateful for positive feedback, and at the same time eager to advance in areas where there's room for enhancements to our services, lets our clients know we have their best interests in mind, we're on their side and part of their team.



Healthcare



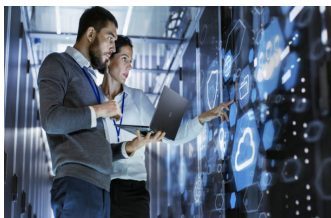
Manufacturing



Entertainment



Oil and Gas



Information Technology



Food and Beverage



Aerospace and Defense



Pharmaceuticals



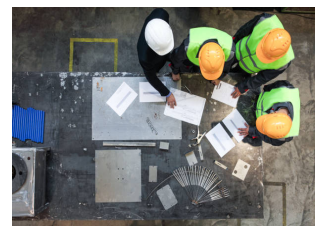
Distribution



Wineries



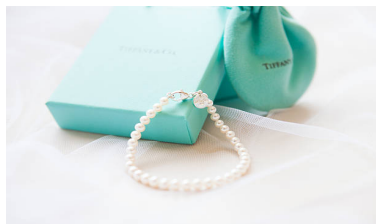
Food Testing



Engineering & Construction



Raw Materials



Retail



Government



Agriculture



# Our Clients

At Coach Technologies our greatest reward is our client's trust. Throughout the entire process, we offer our clients consulting, whether it be in person, by phone, video or by email. We are an agile team, always available to work with you. We value our clients, and your satisfaction is our top priority.

With us, **you will always have a senior executive involved in your project.** We work with you from start to finish. We view ourselves as an extension of your team, and as your partner, we pride ourselves in being fully engaged with your company to help you find opportunities for growth. Some clients like to be more hands-on, while others prefer we handle everything. Either way, you can trust us to get the job done.



# Contacts



**Brigitte Banker**  
Managing Partner  
Principal

## **Brigitte Banker** Managing Partner - Principal

Graduated from the University of Denver  
Degree – Bachelor of Science in Accounting  
Certified Oracle/JD Edwards Mastery Trainer  
President & Secretary of Alpha Gamma Delta

Brigitte has become a powerful voice in the world of entrepreneurship. Today she is the Managing Principal of Coach Technologies which she founded in 2001 to help others find success in their companies.



**Matthew Santori**  
Managing Partner

## **Matthew Santori** Managing Partner

Graduated from Regis University  
Degree - Business  
Oracle Certified Professional  
PMP

Matthew is a business and technology industry veteran, has spent the past decade assisting young and established companies, as well as participating as a leader in various industry sectors both in the US and internationally.

303-808-5749

EMAIL: [info@CoachTechnologies.com](mailto:info@CoachTechnologies.com)

[www.CoachTechnologies.com](http://www.CoachTechnologies.com)

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303-808-5749

EMAIL: [info@CoachTechnologies.com](mailto:info@CoachTechnologies.com)

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