

**A Consulting Company Serving the Budgeting and Planning Industries,
Intuitive TEK Helps Customers Use Technology for Forecasting
Processes with their Adaptive Planning Software Suite**

**Business Services
ERP**

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**Brian Storrs
CEO**

BIO:

Brian serves as the founder and President of Intuitive Technologies, LLC a business consulting organization in the areas of financial consolidation, budgeting, planning, forecasting, reporting and analysis. Through a consultative approach, Intuitive TEK helps organizations improve their business operations and results through more efficient use of ERP systems and process optimization. Intuitive TEK is a strategic partner with Adaptive Planning – www.AdaptivePlanning.com.

Brian started his professional career as an auditor with the national audit firm BKD and then as the Controller of a division of a Communications firm. This accounting background gave Brian the skills to transition to ERP applications consulting. Brian started this career move at JD Edwards as a Financial Applications Consultant and then at the JD Edwards partner MSS Technologies. MSS Technologies was the exclusive reseller for JD Edwards in the Rocky Mountain Region. As a consultant, Brian also worked with the SAP BusinessOne accounting system and Hyperion's Planning product.

Over the past 15 years of working with financial software applications, Brian has always played the role of pre-sales consultant. In this role Brian learned how to match a prospect's needs to the right configuration in the application and present this solution in a way that is often been described as "High Energy".

In 2006 Brian took on the role of Account Executive selling Oracle application software to small and medium sized prospects. Using his background, Brian is able to act not just as account executive but as a consultant during the sales process. Brian was a part of a partner team who was awarded the Top Reseller in the Rocky Mountain Region two years in a row; no other partner had won this award two years in a row.

About Intuitive TEK LLC:

Intuitive TEK is a trusted advisor in the areas of accounting and ERP solutions, financial consolidation, budgeting, planning, forecasting and report-

ing. Our mission is to help our customers more effectively use technology to solve their real world problems.

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

CEOCFO: Mr. Storrs, would you tell us about Intuitive TEK?

Mr. Storrs: We are a consulting company, mostly serving the budgeting and planning industry. We help organizations improve their forecasting processes; with better ways to predict the future, they can make better planning decisions. As part of bringing that service, we also are a vendor for the Adaptive Planning software suite.

CEOCFO: Are companies coming to you as a CPA or are they coming to you more as a boutique consultant?

Mr. Storrs: Most people are coming to us looking for better budgeting and planning methods, looking for tools that might help them. Many have heard about the Adaptive Planning software, it is an industry leader in on-demand planning tools. So on the one hand we guide them in learning about the product, but on the other we want them to be sure they have the resources to implement it across their company. We sell the software and our implementation service together, so an organization has not only a smooth transition into using the new tools, but also can take advantage of our experience to optimize their existing processes so the tools can be more effective.

CEOCFO: Whom are you typically speaking with at a company, and what

types of companies are you working with?

Mr. Storrs: One of the great advantages of Adaptive Planning is that it's a tool set, not a template; it allows us to configure it based on the needs of specific organizations, rather than squeezing their requirements into a set mold. So we get opportunities to fit our service into lots of different industries -- wherever predictive planning and budgeting is used.

CEOCFO: When companies come to you, do they typically have some specific points they are looking to address, or do they want suggestions for their problems?

Mr. Storrs: We see companies hiring new faces after a bad budget or forecasting cycle, maybe a new financial analyst or new director, and they have been told their first job is to "go find a better way." We also see new clients approach us because their legacy systems are becoming outdated, or are simply no longer supported by their old vendor. So we get to have the discussion around the value we bring in converting over to a new system -- even if their old system is "working," we show them the advantages of something more up-to-date.

CEOCFO: I see on your website that you use a structured methodology. So how do you evaluate the problems?

Mr. Storrs: An advantage we have over a lot of vendors is we are not focused on high sales volumes. Intuitive TEK offers a guided service in addition to the software, so we get to spend a lot more time getting to know our clients' needs and what will work best for their implementation. I have got consultants working for me that have their strengths in different areas, so I get to pick who I think is the best fit and bring them into the sales cycle from the beginning. That means customers know who will be guiding them through the process before they commit to anything; it exemplifies our belief that the person implementing the software with you is every bit as im-

portant as the software itself. Sometimes we will showcase how well our approach works by offering a "proof of concept." We will ask what the most complex requirement that they have might be, and demonstrate a build-out to meet that requirement. Obviously it is a far cry from implementing the entire project, but the idea is to show the process and how well it works. So we will build out this "mini project," and review it with the customer, maybe tweak things a bit, and present it again. By the time we do a formal presentation, they've got a really good idea of how well it's going to work -- and they've been working the entire time with the same consultant they'll have when they commit to the full implementation, not some other sales person who's going to hand them off. It is a personable approach that really highlights our level of service.

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- Mr. Storrs

CEOCFO: How is business these days?

Mr. Storrs: Business is good, and we are glad to say our customers are doing well.

CEOCFO: After you get a company up and running what is the ongoing support?

Mr. Storrs: As a partner with Adaptive Planning we provide full support to our customers almost indefinitely, so they can contact us whenever they need to with questions and we'll help them get answers. But the truth is, we just do not get many calls. I like to joke that if I was going to build my business based around post-project follow up services, I would starve to death. Through our implementation process, our customers tend to learn the product at a deep level, between the one-on-one training during implementation and then again at the end of the project -- where we show them how to really "own" their model, and modify it for their organization. Also, Adaptive Planning is cloud-based software; by

definition, an organization's IT department isn't involved. It's the finance team itself that builds its own model, and they can change things as they go along for themselves. Our customers love being self-sufficient, so while we are there if they need us, it is rare that they do.

CEOCFO: What is the strategy moving ahead?

Mr. Storrs: We are proud that we have earned Adaptive Planning's top partner spot several times now, and we want to continue to be their go-to partner looking forward. It is a great time for us to be involved, because it seems like they are constantly releasing new feature functionalities. Anyone paying attention to Adaptive knows they are an upward momentum organization. From our own perspective, we are continuing to embrace cloud-

based software solutions for these types of applications. We just brought on a partnership with an ERP vendor called Accumatica, so we are building that practice

as well. The budgeting and ERP solutions really go well together, so we will be integrating those products into a more comprehensive solution for accounting and financing departments.

CEOCFO: Why should the business and investment community pay attention to Intuitive TEK?

Mr. Storrs: Anyone looking for a way to improve their process should certainly look to us -- and more importantly the successes of our customers. Finance departments should investigate Adaptive Planning -- and Accumatica -- and know that Intuitive TEK puts a face to those platforms and processes.

CEOCFO: Is there anything you would like to talk about Intuitive TEK that we have not covered?

Mr. Storrs: We are always ready to hear from interested organizations, and welcome a chance to present our products.