



Supply Chain Management Preparedness Survey

REPORT & ANALYSIS

March 2006



Microsoft's Message

It gives me great pleasure to present to you the results of our Supply Chain Management Preparedness Survey.

230 companies participated in this survey and we thank them for their cooperation. The participants spanned manufacturing, distribution, retail and other sectors across small, medium and large businesses.

As a technology leader, Microsoft's mission is to enable people and businesses around the world to realize their full potential. Supply chain management is a critical component for companies across these industries as satisfying more demanding customers, managing "faster" inventories and competing globally are now the norm. Microsoft delivers world class integrated supply chain management and the supporting business tools to help address your business challenges.

The hope is that the findings from this survey will shed some light on issues and challenges your colleagues are facing and serve as a catalyst for you to find ways to help improve operational efficiencies in your own supply chain.

Sincerely,

A handwritten signature in black ink, appearing to read "David Willis". The signature is fluid and cursive, with a large initial "D" and "W".

David Willis

Vice President, Small Midmarket Solutions & Partners
Microsoft Canada Co.

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Executive Summary:

Your effectiveness as a company in a supply chain can be measured to some degree by how well you can connect your people, processes and IT systems. Proper management and integration of these elements are essential for making smart business decisions in the manufacturing, distribution and retail sectors. Everyday market changes are forcing companies to adapt in new ways – the first question for you to consider: Is your business prepared to handle these changes?

The Microsoft Supply Chain Management Preparedness Survey was designed and conducted by Microsoft in order to better understand supply chain related challenges and assess how "prepared" organizations are to deal with these issues. Notably, the focus was to discover the usage and attitudes surrounding business systems that can help industries address challenges in their supply chain. The intent is that this report will help you to benchmark your own organization's preparedness relative to others in similar industries.

Canadian firms across the manufacturing, distribution and retail sectors made up the majority of the 230 companies that participated in the survey from October to December 2005.

The survey was endorsed by both the Canadian Manufacturers & Exporters and the Retail Council of Canada.

If you need assistance with certain terms referenced, please refer to the "Terms & Definitions" section on page 19.

Key Findings:

1. Companies are hesitant to adopt and invest in effective Supply Chain Management (SCM) solutions, despite citing **increased competitive pressures** and **more demanding customer requirements**, as the top concerns facing their organizations.
2. The **top three challenges** cited by participants are: Competitive pressures, More demanding customer requirements, and The 'China Price' - but SCM processes are not viewed by most as being critical to address these challenges.
3. Half or fewer companies who participated in the study are using **SCM or integrated Enterprise Resource Planning (ERP) systems** to manage their operations. It is commonly perceived that Medium and Large enterprises are well ahead in terms of leveraging the benefits that SCM or integrated ERP systems provide; yet less than 50% of the respondents (the majority fall within the category for Medium & Large enterprises) are using these systems to manage their operations.
4. The top customer related SCM challenges included: **Customer required delivery performance** which was identified as the top ranking issue, followed by **cost reduction, forecasting customer demand** and **reducing lead time supply chain costs** which were cited by at least half of those surveyed.
5. The **top three objectives of supply chain strategies** are identified as: lower costs, improve customer service and faster deliveries.
6. The **majority of companies have a dedicated staff member to manage their supply**

Failing to take action in implementing SCM may severely impair your company's capability to compete successfully in the global market and achieve your baseline business objectives.

chain but not the technology or software systems to support this role or their top three supply chain objectives.

7. There is a recognized improvement by implementing SCM processes, but more than half of respondents do not plan on making any immediate investments in SCM technologies. Lack of internal expertise, busy "fire fighting" and lack of senior management buy-in are cited as key roadblocks to investment approval.

A growing number of companies are recognizing that a well designed supply chain is a key component of commercial success. It is indeed becoming more apparent that in the new business world, long term survival and success will be determined by global supply chain competitiveness. SCM processes and system offerings are evolving in complexity and proactive management is imperative.

One objective conclusion that can be drawn based on the key findings is that SCM is critical to ensure longevity of an organization. However, less than half of the respondents have identified SCM as critical or extremely critical in addressing their organizational challenges; and the majority of the participants have indicated that it is somewhat or not at all critical.

It is not surprising therefore to find most who participated in this survey do not use SCM technologies at all and almost half do not use any integrated ERP system to manage their operation.

More pressing business priorities were identified by almost 60% of respondents as a major obstacle to implementation of new SCM technologies, followed by **lack of education in the principles and techniques of operating an integrated SCM system, lack of IT resources, the organization is too busy 'fire-fighting'** and **lack of senior management commitment and support**. Each of these factors has been identified by at least 40%.

These results indicate that many of the participating companies lack focus and understanding of the importance and potential of SCM. It appears that there is a perception gap between the business challenges that have been identified and SCM capabilities in addressing these issues to help improve the operation's competitive capabilities.

It should be noted that about three quarters of those surveyed are not using any SCM solutions, and a similar number are not planning to invest in improving SCM operations in the short, medium and long term.

Management needs to realize that in the current business environment, being good enough is no longer good enough. The focus on running the day-to-day business, dealing with issues in a "fire-fighting" mode and the apparent lack of commitment to a long term SCM strategy can put in jeopardy the long term future of their business. This may explain some of the current challenges that they are facing.

As Peter Drucker* said "there is nothing so useless as doing efficiently that which should not be done at all." How can companies be too busy dealing with problems that today's SCM systems can help them solve? What could be more critical in today's competitive environment than developing a sound SCM strategy, making a commitment to invest in education, systems and technologies and the implementation of SCM processes?

Survey Questions & Analysis

Profile of Participants

Type of Business

The majority of participants were manufacturers, specifically those who distribute products themselves or via distributors to customers, followed by service providers, distributors, other industries and retailers. The key takeaway here is the potential challenges that these interconnected industries can experience in their supply chains.

Which of the following statements best describes your organization's role in a supply chain?

We manufacture products and distribute via ourselves or distributors to customers	50.0%
We are a service provider	20.9%
We distribute products to retailers or other customers	13.0%
We manufacture products and distribute direct to retail	9.1%
Other	4.8%
We are a retailer and sell products directly to customers	2.2%

(% companies based on 230 responses)

Number of Employees

67.3% of the participating companies have 50 employees or more which we will classify as mid-market or enterprise size. 32.6% have 50 employees or less which we will classify as small business. These demographics are significant as the majority of mid to large participating companies are usually higher adopters of supply chain processes and technologies.

How many employees does your organization have in Canada?

1 to 50	32.6%
50 to 99	11.7%
100 to 499	30.0%
500 to 1999	13.0%
2000+	12.6%

(% companies based on 230 responses)

Annual Revenue

There was good representation across all revenue segments – with the slight majority having annual revenues of \$21 million or greater.

What is your organization's total annual revenue in Canada?

Less than \$5 million	23.1%
\$5 to \$20 million	24.9%
\$21 to \$50 million	12.2%
\$51 to \$250 million	20.5%
Greater than \$250 million	19.2%

(% companies based on 229 responses)

Dedicated Person Managing the Supply Chain

The majority of participating companies do have someone dedicated to managing their supply chain. However, over a quarter do not have a specific person for this role, and a small percentage don't know if they have someone with this responsibility - this could demonstrate a lack of focus on the issue.

Is there a person dedicated to managing your supply chain within your company?

Yes	68.7%
No	26.1%
Don't Know	5.2%

(% companies based on 230 responses)

Role of Dedicated Person Managing the Supply Chain

For the majority of participating companies, the key responsibility for managing the supply chain resides with the Materials/Inventory management person, followed by Purchasing and Sourcing functional roles.

If yes, what function is this position responsible for?

Materials/ Inventory Management	72.2%
Purchasing	65.2%
Sourcing	57.6%
Warehousing	50.0%
Transportation	48.1%
Production Planning	42.4%
Distribution	38.0%
Customer Service	35.4%
Sales Forecasting	21.5%

(% companies based on 158 responses)

Information Technology (IT) Usage Profile

Available SCM and IT solutions that have been designed to specifically help deal with the issues encountered in a supply chain are not being used by the majority of the survey participants.

Usage of basic business software systems is low overall with this base of companies.

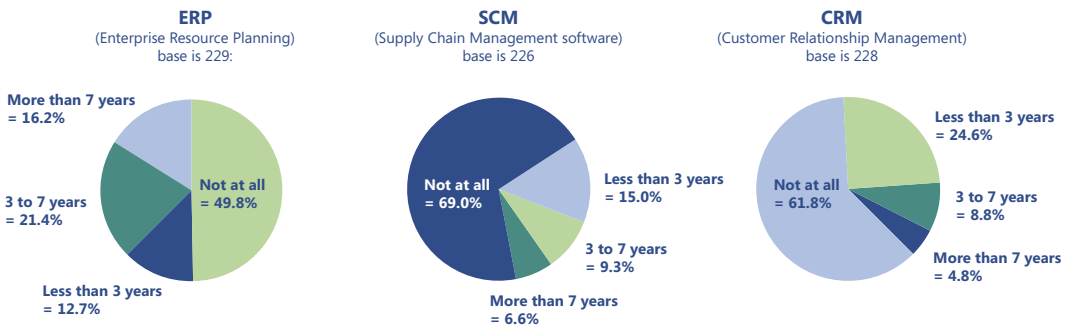
Almost half are not using ERP systems; over two thirds are not using SCM systems and over 60% are not using Customer Relationship Management (CRM) systems to help manage their business information.

My company has not been using the following IT solutions:

ERP (Enterprise Resource Planning) (base 229)	49.8%
SCM (Supply Chain Management) (base 226)	69.0%
Inventory Planning software (base 227)	47.1%
Collaborative Portals (customer or supplier) (base 223)	64.1%
Demand Planning (base 226)	64.6%
EDI (base 226)	50.9%
Bluetooth Technology (base 225)	86.2%
Customer Relationship Management (CRM) (base 228)	61.8%
Warehouse Management Systems (WMS) (base 226)	60.2%
Transportation Management Systems (TMS) (base 226)	75.7%

(% companies based on base number of responses in parenthesis above)

My company has been using the following IT solutions for this length of time:



The underutilization of technology becomes even more apparent when it comes to solutions such as Collaborative Portals, RFID and Collaborative Planning to mention a few. Some of these SCM solutions and IT systems and technologies such as ERP, EDI, WMS, Bar coding, and RF data collection have been available for many years. A large percentage of respondents do not take advantage of these tools to enhance SCM and improve the value chain activities, and therefore do not realize the benefits that such tools can help to provide.

My company has not been using the following specific SCM solutions:

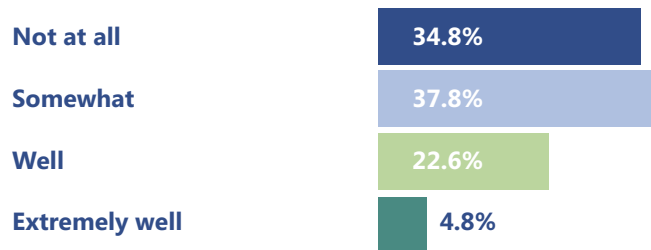
Supply Chain Network Planning (base 228)	74.6%
Collaborative Planning with Customers and Suppliers (base 226)	56.2%
Replenishment Planning (VMI) (base 228)	65.8%
Collaborative Planning Forecasting and Replenishment (base 227)	77.1%
e-commerce (base 226)	61.9%
Bar code applications (base 205)	52.2%
RFID (base 226)	87.2%
RF Data Collection (base 226)	81.9%
EDI (base 226)	53.5%
3PL (base 227)	83.3%

(% companies based on base number of responses in parenthesis above)

Are your ERP/SCM systems integrated?

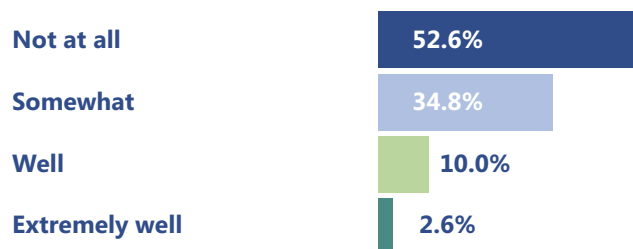
An effective SCM system assumes that supply chain partners freely exchange data and information in an integrated network. We tried to establish how integrated these systems are among the survey respondents across these areas.

From back office or shop floor to front office or storefront?



Base = 230

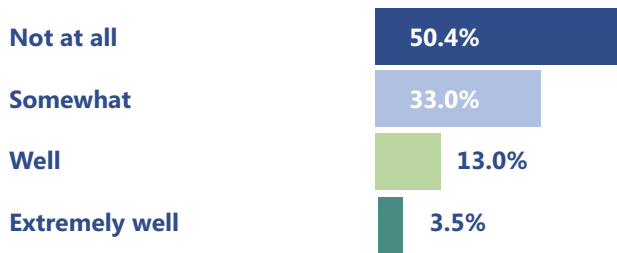
From operations to suppliers?



Base = 230

Integrating and involving supply chain partners are essential to achieving competitive advantage. Yet, for more than half of the survey participants, suppliers and customers, even internal processes and systems are poorly integrated.

From operations to customers?

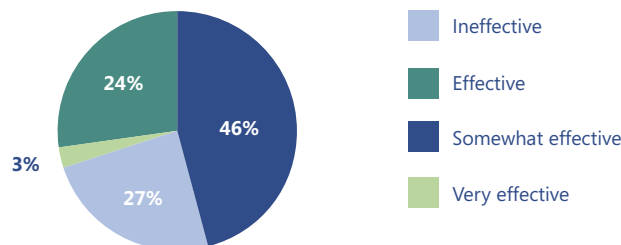


Base = 230

It would appear that integrated systems that truly manage supply chain information across enterprises and disparate systems are not yet common. Participants believe that system integration within their organizations is low and even lower within their supply chain. This indeed diminishes the effectiveness of such supply chains. Effective inventory management is ranked as one of the most important aspects of supply chain success. High inventory levels can be considered evidence of an inefficient supply chain.

As revealed earlier, a large percentage of respondents fail to take advantage of SCM tools to enhance their operations and improve their value chain activities. Therefore, participants do not realize the benefits that such tools can help provide – only about a quarter of the respondents find their ERP/SCM solutions to be effective.

Overall effectiveness of your ERP/SCM solutions



Base = 229

To illustrate further the impact IT usage has on the perceptions of the participants for the previous integration and effectiveness questions, the base number of companies that actually use ERP and SCM solutions are as follows:

- 115 companies are using ERP solutions out of 229 responses to the question.
- 70 companies are using SCM solutions out of 226 responses to the question.

For overall effectiveness of ERP and SCM solutions, those companies that actually use these systems had fewer “ineffective” perceptions than the entire sample of respondents which is quite positive:

- Only 8.7% (10 of 115) of ERP users found their systems to be **ineffective**.
- Only 5.7% (4 of 70) of SCM users found their systems to be **ineffective**.

Most Effective SCM Processes & Technologies

Although ERP, MRP and Bar coding had modest adoption across the total group of companies, these must still seem to be effective taking into consideration the small number of participants that are actually using these technologies. In fact, 77% of those actually using ERP found it to be one of the most effective technologies for their organizations.

Which of the following SCM processes and technologies are the most effective for your organization?

ERP	45.2%
MRP (Material requirements planning)	44.3%
Bar coding	39.6%
CRM	24.8%
Demand Management	24.3%
VMI (Vendor Managed Inventory)	11.7%
RFID	7.4%

(% companies based on 230 responses)

Top Objectives, Issues & Challenges

We would like to examine the survey results for your business objectives against the classic definitions of SCM and the broader definition of value chain: Supply Chain Management is the management of the entire value chain, from the supplier to manufacturer right through the retailer and the final customer.

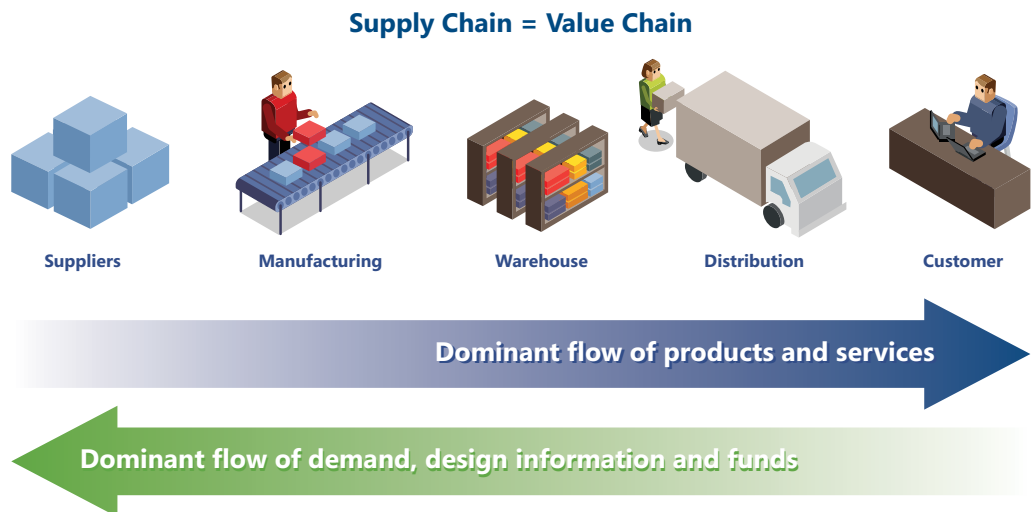
How do we define an excellent supply chain?

1. It supports, enhances and is an integral part of the company's business strategy.
2. It leverages the supply chain model* to help achieve and sustain competitiveness.
3. Its effectiveness is measured against a well defined set of metrics.

Some of the key objectives for a supply chain are:

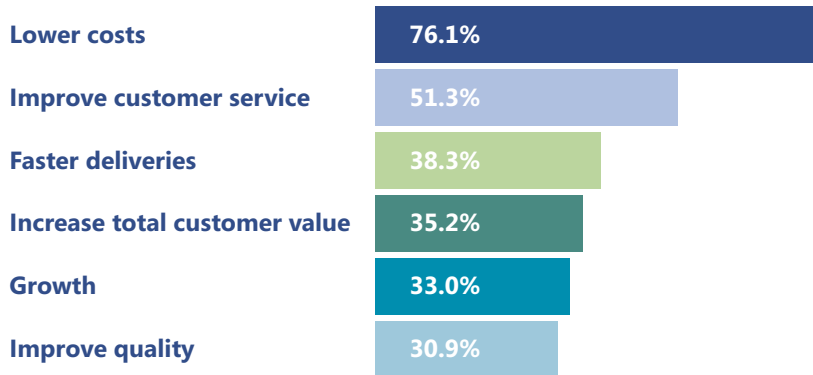
1. Help increase sales and margins by implementing customer requirements more efficiently.
2. Offer superior customer service.
3. Get the right product to the right place at the least cost.
4. Keep inventory as low as possible.
5. Increase transaction speed by exchanging data in real time.
6. Reduce all cycle times.

The value chain which is often used synonymously is a broader management approach that incorporates the supply chain. It identifies the primary activities that create value for customers. It starts with raw material supply and continues through parts and components production, manufacturing and assembly, distribution and retailing, to the end user of the product or service. The objective is to eliminate all non-value-added activities in producing and providing a good or service, while adding value throughout the process. These objectives have been mostly identified by the survey respondents.



* The supply chain model incorporates the suppliers and the customers in one value chain and assumes a 'whole' system approach rather than isolated links. This concept or model can be leveraged to achieve and sustain competitiveness.

What are the top THREE objectives of your supply chain strategy?



Base = 230

There was also a high degree of correlation between the supply chain objectives and the top business challenges faced by their organizations.

Top THREE customer related challenges for your supply chain

Customer required delivery performance was the biggest issue in this category followed by cost reduction and customer total value.

What are your top THREE customer related challenges for your supply chain?

Customer required delivery performance	68.7%
Cost reduction	57.8%
Customer total value	45.2%
Manufacturing/ supply capability	44.8%
Supply chain response time	40.0%
Inventory visibility	26.5%
Distribution visibility	13.5%
Other	2.6%

(% companies based on 230 responses)

Top THREE internal related challenges for your supply chain

Forecasting customer demand, reducing lead time and reducing supply chain costs were all fairly close to make up the top three internal supply chain challenges.

What are your top THREE internal related challenges for your supply chain?

Forecasting customer demand	56.1%
Reducing lead time	53.5%
Reducing supply chain costs	49.1%
Reducing inventory	36.1%
Managing product volume variety	34.3%
Customer required quality	27.4%
Lack of supply chain skills	24.8%
Lack of IT support	16.5%
Other	0.4%

(% companies based on 230 responses)

Single Biggest Issue

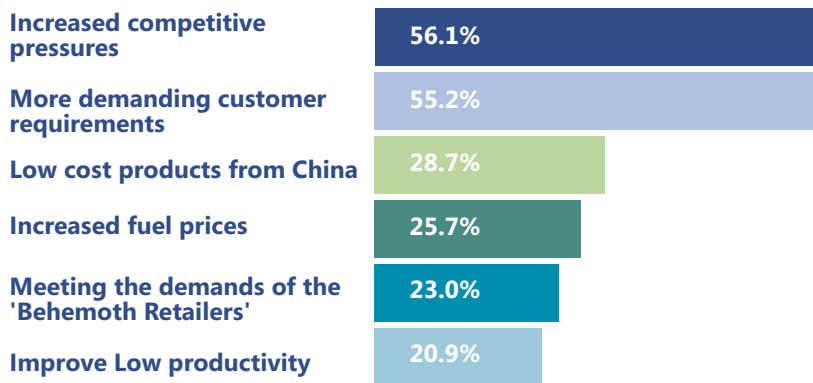
Profitability of operations is the overwhelming number one issue for participants with well over one third making it their choice. Meeting customer demands and speed and flexibility also earned mention. It seems that supply chain related issues indeed dominate the respondents' business agendas.

The single biggest issue facing our organization is:

Profitability of operations	37.6%
Meeting customer demands	19.7%
Speed and flexibility	15.3%
Cost control measures	14.4%
Acquiring and retaining skilled employees	10.5%
Other	2.6%

(% companies based on 229 responses)

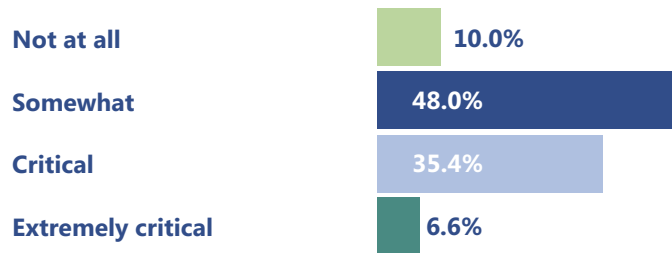
What are the top THREE challenges facing your organization today?



Base = 230

Considering the above items, the expectation might be that SCM will be recognized as a critical process, due to its inherent capabilities to address and alleviate these issues. However, 42 percent of the respondents identified SCM as critical or extremely critical in addressing their challenges, while more than half indicated that it is somewhat or not at all critical.

How critical are SCM processes in addressing the top three challenges identified?



Base = 229

There is an apparent significant gap between the perception and the benefits of SCM reality. Despite the potential payback around SCM, many companies still do not consider SCM as critical to their continuous success. Although they identified their SCM objectives and business challenges fittingly, they fail to see SCM as a potential solution. Understanding how SCM solutions can help to address the top challenges facing these organizations would offer strong options to help improve their situation.

Measurements & Methodologies

Top three measurements to determine effectiveness of SCM processes

Gross margin was the #1 measurement to determine the effectiveness of SCM processes followed closely by on time delivery to customer request and then inventory turns. Interestingly, Return On Investment (ROI) was not in the top four.

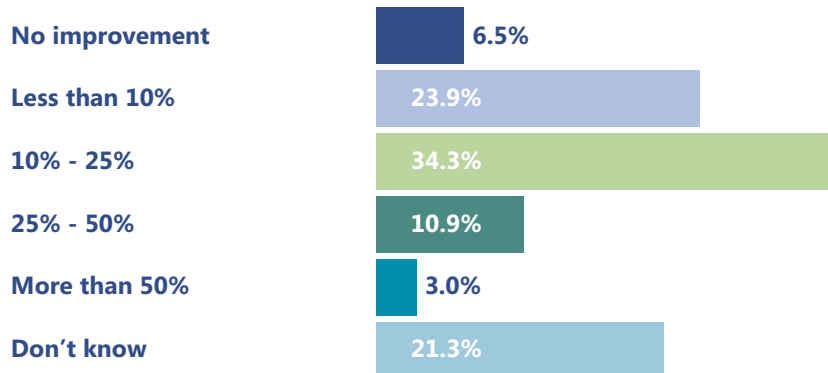
What are the top THREE measurements that your company is using to determine the effectiveness of your SCM processes?

Gross Margin	58.7%
On time delivery to customer request	57.4%
Inventory turns	36.1%
Manufacturing Cost variances	30.9%
ROI	25.2%
Purchasing Cost variances	23.5%
Order fill rate	17.4%
Sales per employee	14.3%
Utilization levels	11.7%
Number of RMAs	9.6%
Lost customers	7.8%
Other	6.1%

(% companies based on 230 responses)

Performance improvements resulting from implementation of SCM processes

The majority of those users who found SCM to be effective, also found major performance improvements of their key performance measurements.



Base = 230

Interestingly, more than 20% of respondents did not know if implementing SCM processes actually contributes to improved performance.

Improvement methodologies to improve supply chain processes

Continuous improvement was by far the most popular improvement methodology with over 70% of participants. Lean thinking, Lean manufacturing and Just in Time (JIT) were also significant methods to improve supply chain processes.

What improvement methodologies are used to improve your supply chain processes?

Continuous improvement	70.5%
Lean thinking	41.1%
Lean manufacturing	38.3%
Just in Time (JIT)	33.0%
Total Quality Management	27.0%
Benchmarking Best Practices	24.3%
Six Sigma	17.8%
Theory of Constraints (TOC)	11.7%
Other	5.7%

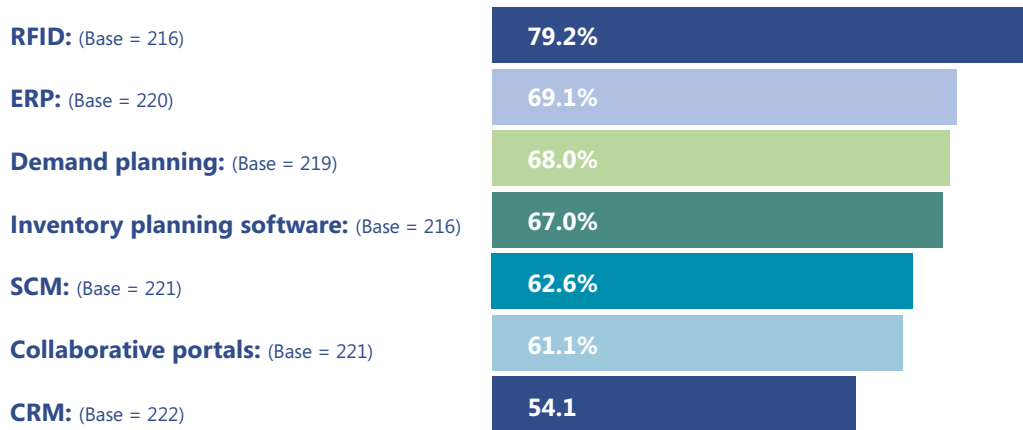
(% companies based on 230 responses)

The "BIG" Question

From these survey results, it seems that there is a high correlation between an organization's top issues, objectives, challenges and customer demands. It is evident that SCM processes can have a positive impact on the organization's ability to meet its objectives.

For the majority of organizations that are not using available SCM systems and IT solutions, the BIG question is: **What are they planning to do about it?**

Are you considering investing in these technologies to improve SCM operations? - NOT AT ALL

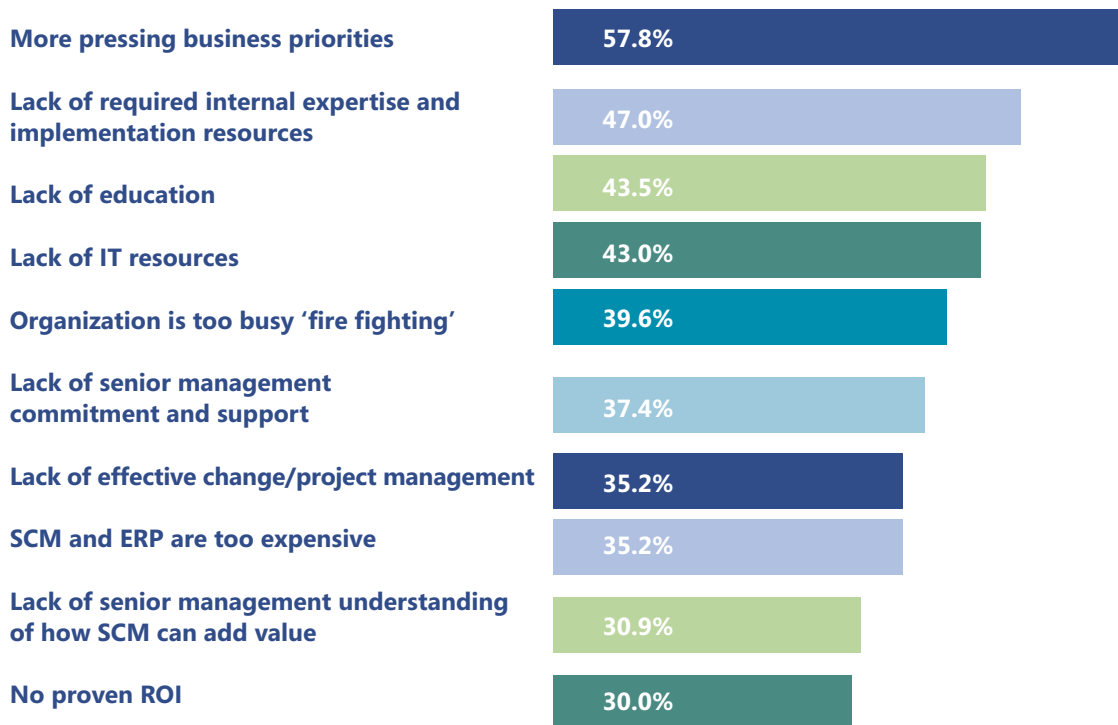


If most respondents are not using available solutions and are not planning to invest in them in the future, how are they planning to stay competitive and achieve their business objectives?

The majority responded decisively: we are planning to do **nothing** with respect to the use of software technology.

With the mounting evidence of the criticality of SCM and its potential contribution to improving performance, how and why do most surveyed choose to do **nothing**? What are the perceived obstacles that are preventing these companies to invest and implement SCM solutions?

Obstacles to investment and implementation of new SCM solutions/technologies:



Base = 230

Approximate IT Spend in 2005 & 2006

It is obvious from the current lack of business systems, combined with the related challenges and issues that the participating industries need to reinvest in their businesses. Over half of the companies will only be investing 2% or less of their sales revenue on information technology. Further, well over half will be keeping their spending the same in 2006 which will not address their need for SCM systems and related technologies in the near future.

Please indicate your organization's approximate level of information technology spending in 2005 (as a percentage of sales in Canada):

0 to 2%	55.9%
3 to 6%	26.2%
7 to 10%	12.2%
Greater than 10%	5.7%

(% companies based on 229 responses)

What is the anticipated change in Information Technology (software) spending for 2006?

Stay the same	46.5%
Increase	45.2%
Decrease	8.3%

(% companies based on 228 responses)

Conclusions and Recommendations

Over the last decade more and more organizations have drawn the conclusion that they can no longer compete in isolation. This has resulted in a shift in corporate strategies and a focus on the supply chain as a better way to manage customer service, responsiveness, asset utilization and business complexities. Managing products from start to finish, from suppliers to customers, and focusing on optimizing the execution of the supply chain has become a key component of their overall strategy and a major contributor to maintaining their market leadership position. In a world where customers are more demanding and have a large number of choices, servicing them with reliability and flexibility is crucial to the financial success of a business. As more evidence that supply chain practices help contribute to the financial performance of a company is accumulated, the drive behind this trend will only increase.

Recommendations for Companies

- Align the overall short medium and long term business strategy with an integral SCM execution.
- Make education and training in SCM principles, techniques and practices a high priority.
- Encourage managers to step back from the day-to-day 'fire-fighting' mode of operation and allocate time to plan for the future.
- Make a commitment to invest in SCM solutions and new IT technologies to achieve supply chain process improvements.
- Promote and manage change. Change is a constant reality that can offer opportunities.
- Open communication lines with suppliers and customers. Companies need to closely integrate themselves into the supply network. Supplier-side and customer-side collaboration is essential in order to optimize the supply chain.
- Focus on improving forecasting techniques, order cycle time through improved interaction with customers and suppliers, and optimize inventory levels.
- Start planning for new technologies that provide supply chain transparency, such as RFID. These will change the way you use information, so get ready.
- Measure the effectiveness of SCM against critical market and customer focused performance measurements such as on-time delivery, inventory turns, lead times, etc.

It is high time for action. To quote Peter Drucker once more, if companies "continue to do what they have always done, they will always get what they have always got." While the business world is changing, the companies that fail to take action could struggle, will continue 'fire-fighting' and eventually could fail.

The supply chain winners of the future will have high performance SCM business processes and empowered people that leverage available technology to help provide superior customer value.

Definitions & Terms

Bluetooth Technology

A short-range radio technology aimed at simplifying communications among internet devices and between devices and the internet. It also aims to simplify data synchronization between internet devices and other computers. Unlike other wireless transmissions technologies, Bluetooth is intended to be used by devices that are close to each other.

Customer Relationship Management (CRM)

Customer Relationship Management is an approach a company takes to attract and retain customers, backed up by thoughtful investment in people, software technology and business processes.

E-commerce

E-commerce (electronic commerce or EC) is the buying and selling of goods and services on the Internet, especially the World Wide Web. In practice, this term and a newer term, e-business, are often used interchangeably.

Enterprise Resource Planning (ERP)

Business software applications that integrate all information flows that have to do with management of the different corporate functions – finance, production, sales, logistics.

Material Requirements Planning (MRP)

Software-based Material Requirements Planning systems translate forecasts into master production schedules, maintain bills of material (lists of product components), create work orders for each step in the production routing, track inventory levels, coordinate materials purchases with production requirements, generate “exception” reports identifying expected material shortages or other potential production problems, record shop-floor data, collect data for financial reporting purposes, and other tasks depending on the configuration of the MRP package.

Portal

A class of applications that enables organizations to unlock internally and externally stored information and provide users a single gateway to personalized information needed to make informed business decisions. A portal works to consolidate, manage, analyze, and distribute information across and outside an enterprise.

Radio Frequency Identification (RFID)

RFID is a technology that incorporates the use of electromagnetic or electrostatic coupling in the radio frequency portion of the electromagnetic spectrum to uniquely identify an object. RFID is coming into increasing use in industry as an alternative to the bar code.

Supply Chain Management (SCM)

The process to manage the flow of products from the supplier to the customer with minimal costs while still meeting the needs of the customer.

Value Chain

A string of companies working together to satisfy market demands. The value chain typically consists of one or a few primary value (product or service) suppliers and many other suppliers that add on to the value that is ultimately presented to the buying public.

Warehouse Management Systems (WMS)

Software designed specifically for managing the movement and storage of materials throughout the warehouse. WMSs are often set up to integrate with data-collection systems.

About the Authors

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Chaim is the president of C.S. Consulting Associates Inc. (www.csc.ai.com) a Toronto based consulting firm, providing consulting and education services to manufacturing and service companies.

Chaim is an acknowledged expert and educator in the fields of Lean Thinking, Supply Chain Management, Materials Management, TOC and the implementation of ERP Systems. Chaim is a graduate of Tel Aviv University, and holds an MBA from the University of Witwatersrand.

Chaim is Certified at a Fellow level in Production and Inventory Management (CFPIM) and Certified in Integrated Resource Management (CIRM) by APICS, the Association for Operations Management. He is also certified as a Jonah by the Goldratt Institute.

Microsoft Canada Co.

Microsoft Dynamics™ business software is a line of integrated business applications and services that allow small and mid-sized organizations and divisions of large enterprises to connect employees, customers, and suppliers to help improve efficiency. The financial management, customer relationship management, supply chain management and analytics applications work with Microsoft software such as Microsoft® Office and Windows® operating system to help streamline processes across an entire organization, giving businesses insight to respond rapidly, plan strategically and execute quickly. Microsoft Dynamics are delivered through a worldwide network of channel partners that provide specialized services and local support tailored to a company's needs.

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