

INSOURCE INSIGHTS: HOLIDAY GIVING



It is the time of year where we focus on giving and being thankful for all we have. We thought it might be helpful to write about some “free stuff” and “bargains” readily available to you not just at the holidays, but throughout the year.

In managing toward the goal of operating as effectively and efficiently as possible, it can be helpful to benchmark your business against competitors or similar type businesses and set up a management “dashboard” which summarizes, in a clear, concise manner, the data you need to act upon to successfully manage your business. The information to assist you in benchmarking and devising a dashboard is readily available. A great site for information on public companies, in addition to their own websites, is <http://www.sec.gov/edgar/searchedgar/companysearch.html>.

The SEC’s Edgar database provides “free” public access to corporate information, allowing you to research a public company’s financial information and operations by reviewing registration statements, prospectuses, and periodic reports filed on Forms 10-K and 10-Q. You also can find information about recent corporate events on Form 8-K. At either the Edgar website or the company’s website, you can access quarterly and annual reports and investor presentations which provide a good overview of a company’s strategy, goals, and the metrics its management focuses on to run the business.

For example, a local technology company, Mercury Computer Systems, in Chelmsford, MA, recently posted its 12th Annual Investor Conference presentation on the Edgar site. In the financial review section of the presentation you can see that the company tracks, among other things: bookings, backlog, revenues, profits, cash flow, and balance sheet liquidity. It has a target financial business model, which outlines target levels for gross margin, operating expenses, R&D, operating income and adjusted EBITDA. If your company was in a similar line of business, this would be valuable information you can use for benchmarking and to help you as you think through the metrics for your dashboard.

From a nonprofit organization perspective, we’d like to remind you of the “bargains” offered to you by TechSoup.org. TechSoup is a nonprofit whose mission is to provide other nonprofits and libraries with technology that empowers them to fulfill their missions and serve their communities. As part of that goal, the organization provides technology products and information geared specifically to nonprofits and libraries. All donated and discounted products are available for a small administrative fee that supports the organization. For example, on the website at the time of this article, TechSoup is offering Microsoft Office 2010 (various versions) for administrative fees ranging from \$23 to \$31. TechSoup also offers learning resources such as articles, blogs and free webinars. Its donor partners include Microsoft, Adobe, Cisco, Intuit, and Symantec.

Another great technology bargain for nonprofits comes from The Salesforce.com Foundation. The foundation provides 10 [Enterprise Edition](#) licenses to qualified nonprofit organizations at no cost – yes, we said “free”. This software is a leading product for contact management and can help you organize your constituent relationships – donors, volunteers, etc. – giving you access to this information in a way that helps you optimize these relationships.

So, check your technology road map, and capitalize on some great deals on technology that can improve your efficiency and help you do more with less.

If you would like help benchmarking your organization to other similar organizations, developing a management dashboard report, or building a technology road map, Insource Services can help. Finally, one gift that we would like to extend to you is a genuine thank you. We sincerely thank you for your business and your support in 2011. We look forward to working with you in 2012 and wish you all the best in the New Year!

Want to learn more? Contact Sharon Stone, Director, Business Development to learn how our Finance, HR, and IT expertise can support your organization