

Case Study

H.H. Robertson, UK

"Thanks to Gary Patterson's superior leadership and financial expertise, we were able to make significant strides towards achieving our goals. I have known Gary for several years, and seen firsthand how he utilizes his first-rate mind and interpersonal skills to achieve major business successes."

Charles H. Ricker

*Former Chairman and Managing Director
H.H. Robertson, UK*

H.H. Robertson was undergoing an intensive "ground up" project that required extensive participation by all areas of the company, in particular operating management and personnel. We contracted with Gary Patterson to help us implement an integrated, centralized database information that would cover all aspects of the company's operations. Gary Patterson was the ideal person to help us because of his strong, multi-disciplined background, extensive business management experience, and his powerful interpersonal skills.

Gary was given broad authority, reporting to the Managing Director, with a directive to:

- Achieve a consensus among operations personnel of the performance characteristics that we required from an information system; a "wish list".
- Using these requirements, write the specifications for the perfect software package for us (the use of bespoke software was categorically ruled out).
- Select the best package from those available, considering ability to meet our specified needs, vendor support, reliability, and growth potential.
- Prepare and direct the execution of a long-term program to implement the systems (hardware, software, and interpersonal).
- Achieve his results through the active participation of operating personnel and management, who were to be both his customers, and his staff.

Under Gary's direction, we selected J. D. Edwards as our software system, and the IBM AS/400 as our hardware system. We have now successfully installed the AS/400 and the following JDE modules:

- Accounts Payable
- Invoice Register
- Electronic Funds Transfer
- Address Book
- Job Costing
- Distribution, including Purchasing and Inventory

In addition, we have started work on implementation of the following JDE modules:

- Product Data Management
- Works Orders
- Accounts Receivable

We have also made the critical business decisions, and developed plans for implementing the Manufacturing and Sales Order Processing modules. During this process it became obvious that we needed a capability that was not available within the existing JDE systems design, the ability to dimension parts and products.

Gary defined this requirement in some detail to JDE personnel and management, and worked successfully to get this feature added to the JDE software. This work is now being completed, and HHR (UK) has been selected as one of three Beta Test sites for this new software feature.

Due in large part to Gary's leadership and personal efforts, we have made major strides towards our goal of implementing a comprehensive, integrated database information system. The modules we have installed are working exceptionally well, and we have achieved significant operational improvements and savings from their use. As a result, we have been designated a "Premiere Site" by JDE because of the way in which this project has been managed.

I have known Gary for several years, and seen first hand how he utilizes his first-rate mind and interpersonal skills to achieve major business successes. He is a Stanford ABA, former "Big 4" CPA, and has served as CFO of several companies. His business experience ranges from entrepreneurial start-ups to Fortune 500 multi-nationals. He has my highest recommendation for personal character and business effectiveness.

Charles H. Ricker
*Former Chairman and Managing Director
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