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CRM for you and your clients

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Agenda

- What is CRM
- Accountant's view of a small business
- Entrepreneur's view of a small business
- Why every business needs CRM
- CRM market place
- The golden rule of first-time CRM
- Applying CRM to your consulting business
- Adding value to your clients
- Summary



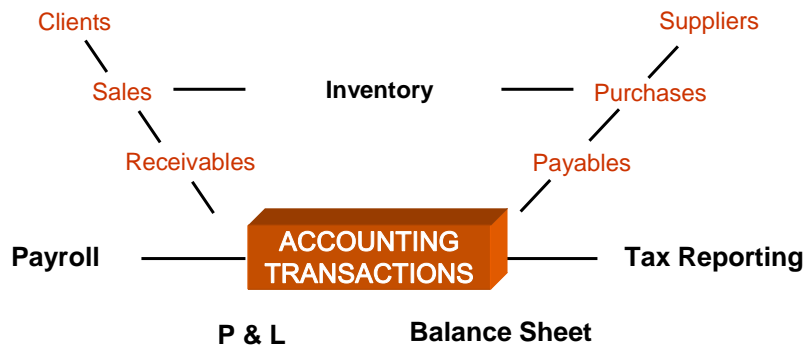
Customer Relationship Management

- CRM is not a sales automation tool
- a CRM system...
 - Is a shared repository of all client information
 - Contains a history of all client interactions
 - Ensures everyone is 'in sync'
 - Is used to manage/allocate resources
 - Ensures you have the finger on the pulse of your business



CRM is used to make informed business decisions



Accountant's view of a Small Business

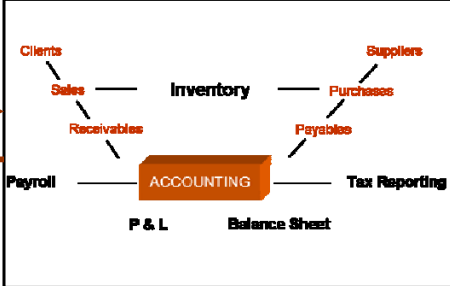


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Entrepreneur's view of a business

Marketing Communication	Support Services	Sales
Web	Installations	Sales Teams
Marketing	Consulting	Performance
News Letters	Service & Repairs	Forecasts
Lead Generation	Scheduling	Sales
Client Satisfaction	Satisfaction	Repeat Sales
Referrals	Failure Rate	





CLIENT INFORMATION & RELATIONS

ACCOUNTING

CRM is the center of all information in the business, including accounting information.

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Integrate accounting data within CRM

Legrand CRM PRD 5.00 Pre-Release June-1 -- Datafile (V5 test) C:\CRM_DATA\A_V5TEST

File Edit Administration Report Help

Snapshot Companies Contacts Campaigns Opportunities Cust. Services Item Tracking Calendar Outlook Web Capture

QuickList

List by Keyword

List by Type

My Records Work List All Records

27 records

Company Name	State	City
Ace Technologies	CA	Los Angeles
Bed Heads	VA	Gilmore
Best in the West	CA	Walnut Creek
Better Beds	VA	Richmond
Brown Enterprises	CA	Hill Valley
Bruno Corporation	NJ	Morristown
Bust That	GA	Somewhere
Contemplation Toy War...	CA	San Mateo
Cranberry Grand Plaza	PE	Wickham
East West Games Inc.	FL	Orlando
ENZED Solutions	TX	Dallas
Fenestree Software	CA	San Diego
Fun Times Games	CA	San Mateo
Homes First	NV	Henderson
Intuit	ca	Mountain Vie...
Joe's Plumbing		Auckland
Khups' Cups	MA	Boston
Left Right Out	MI	Ann Arbor
Legrand Software	CA	San Francisco
Morrison Mercedes	CA	AnyTown
Murphy Enterprises	CA	Menlo Park
O.T.S.D.	SA	Salisbury
Pearl's of Wisdom	MO	St. Louis

Company Detail

Company: Best in the West Account Manager: Brown, Sue

Street: 12345 Commercial Road Type: Buyer

City: Walnut Creek Industry:

State: CA Phone: 533 636 2783

Postcode: 73882 Fax:

Country: USA User-01:

Web URL:

Accounting Menu	Transactions	Payments Outstanding	Notes
Account Code: 90000-1149092288	Sales This Month: 0.00	Current Balance: 0.00	6/13/2007 Check bounced. On credit Hold
AccountingII: Customer	Sales Last Month: 0.00	Balance 30: 0.00	
	Sales This Year: 0.00	Balance 60: 0.00	
	Sales Last Year: 1,199.00	Balance 90p: 1,199.00	
		Total: 1,199.00	
		Credit Limit: 0.00	

Calendar Events Activity Notes Tasks Opportunities Campaigns Cust. Services Item Tracking Transactions

Record range: 3 Yr

Date	By	Type	With	Summary
12/14/2006	Sue Brown	Appointment	Sally-ann Lynch	Re-assigned Calendar Event 'on-site visit to present 2007 product' to De...
12/13/2006	Demo User	Phone Call	Sally-ann Lynch	Sally-ann called to ask for a presentation of the new product range
12/13/2006	Sue Brown	Phone Call	Kel Baker	Called Kel to say we'd like to invite him to our end of year party
12/8/2005	Demo User	Cust. Service	Kel Baker	Opened new Cust. Service no. 1006



Why every business needs CRM?

1. For Staff – stay ‘in sync’

- The most frustrating experience for a Customer is to call a Supplier and find out nobody knows anything
- Avoid islands of information

2. For Management – making informed decisions

- Avoid reporting and planning inefficiencies
 - What happened last week, what is planned this week?
 - How many new contacts?
 - How many outstanding Customer Service issues?
 - Sales Funnel, sales forecast
 - Which customers have we not been in touch with lately?



Further uses of CRM

3. Calendaring / Scheduling

4. Client Communications

- Newsletters, targeted mailing lists

5. Client Acquisition tool

- Integrate web leads into CRM
- Track effectiveness of marketing campaigns

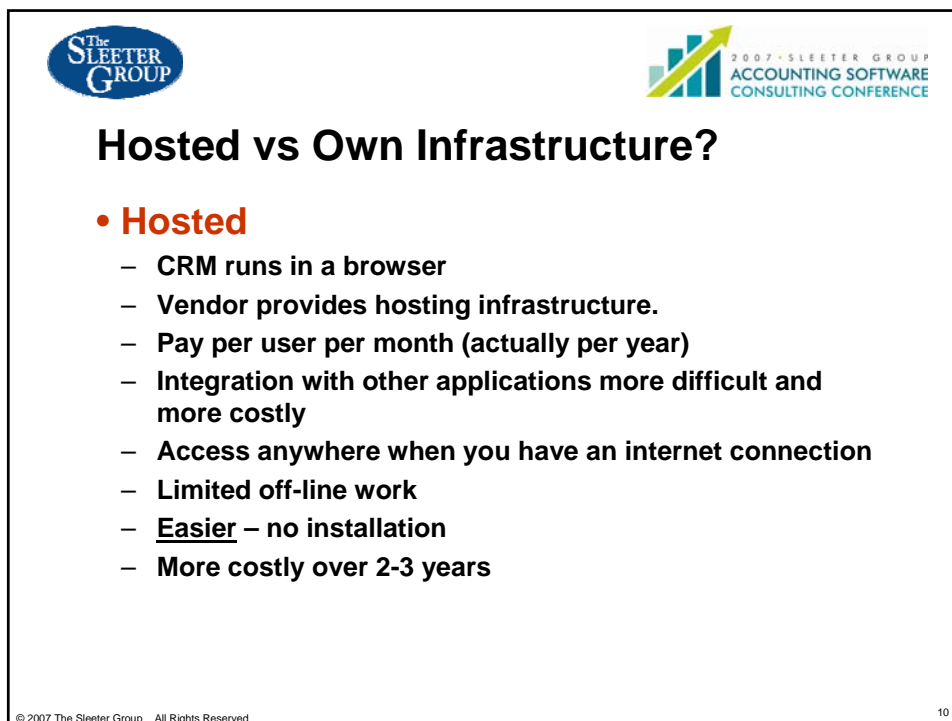
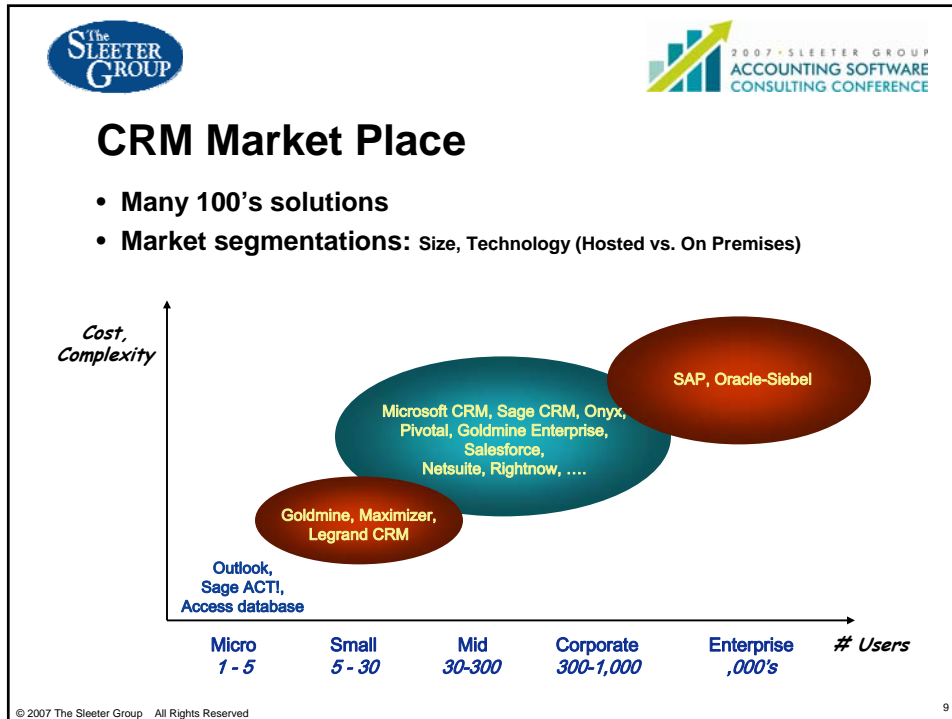
6. Sales Management tool

- Which sales rep is the most successful & why
- Forecast, sales funnel

7. Customer Service tool

- Use it for Installations or after-sale service
- Which product category has the most service issues?

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Hosted vs Own Infrastructure?

- **Own Infrastructure**

- Application runs on your PC; data is on file server
- richer interface and faster application
- Uses your IT infrastructure:
 - Software must be installed (and upgraded)
 - You're responsible for backups and keeping it running
- Not dependent on internet connection
- Fully supports remote users
- Use anywhere anytime with localized data on your laptop
- Interface to 3rd party applications has less restrictions and is faster



The Golden Rule of first-time CRM

- Use CRM selectively to start with
- When implementing CRM don't try to do it all at once, focus on the 1 or 2 functions that will deliver the biggest bang for the buck.
- This will deliver the highest return in the shortest period of time.
- As your business grows so too will your CRM usage
- At every point set your self clear objectives



CRM for your firm

- **Client communications**
 - Keep clients informed on the services you deliver, your Tips, your seminars, ...
- **Client History**
- **Group calendaring**
 - Assigning resources
- **Web leads**
 - Rapid response to new leads
 - Don't let anything fall through the cracks
- **Become a regular user of CRM in your business. This will enable you to spot opportunities for Value-Add to your clients**



Adding value to your client

- **The 3 steps to becoming a hero**
 - #1 Find the two biggest operational challenges
 - #2 Measure the cost/value
 - #3 identify an easy-to-use CRM solution to address the problem.
- **You don't have to be a CRM expert to identify the problem and point your client to a solution**
- **When you do this you're adding real value to your relationship with the client. Their loyalty to you is stronger.**



The next step

- Go to the CRM Vendor sessions
- Implement CRM in your own business
 - Keep it simple, don't try to do too much
 - Get familiar with what can be done
 - Measure your own improvements
- When you visit clients, ask them what their biggest operational challenges are
- You'll see some common issues emerge
- Become the Trusted Advisor, point the client towards a solution



Summary

- CRM and accounting are the two essential building blocks of any successful business
- You can add real value to your relationship with your clients by becoming familiar with CRM and spotting opportunities where you can help