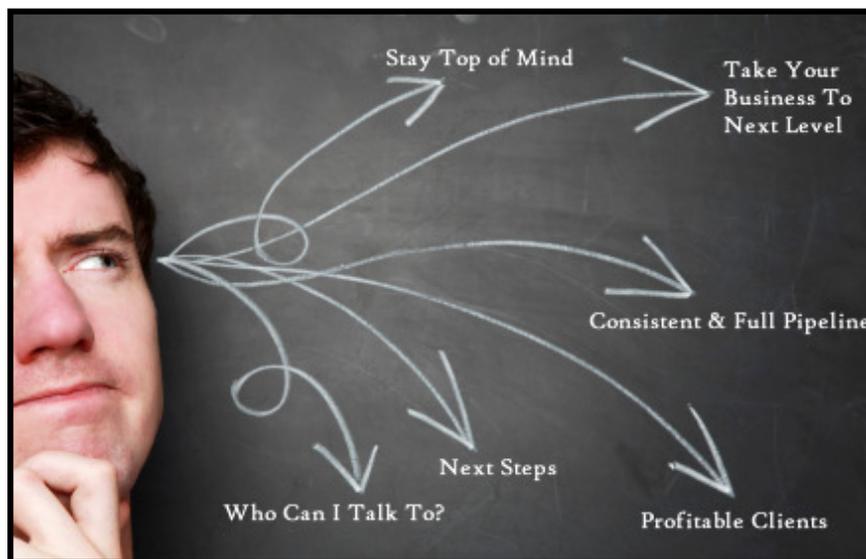


## Make Your Business Work Smarter with CRM

### **Congratulations.**

You run a pretty good business. Sure, there have been some ups and downs, not surprising with the volatility of the economy. Your ideas are innovative, well-executed and even documented so processes are repeatable. You have provided the appropriate services to the right clients. You have hired talented people who share your vision. You absolutely care about your clients and are passionate about what you provide them.

After employees, clients are the greatest asset a professional service firm has. Providing your clients with knowledge and value further deepens the relationship you have with them. Client relationship strategies should continue to be assessed and refined.



If you haven't taken a long hard look at your business lately, maybe it's time to. Below are four questions to get you thinking. See if anything resonates with you.

### ***Is there a better way to acquire, retain and develop profitable customers?***

How are you managing your client relationships today? Do you have a sales force where the salesperson owns the relationship with the client? Is your client information centralized where everyone has access to it? Or is everyone using their own system – from simple contact managers to spreadsheets to sticky notes? Are you tracking meaningful data on your clients so you can learn more about what your ideal client's characteristics are?

Having one central database that is easily accessible for those who work with your clients is crucial to on-going success. Knowing and understanding who your clients are enables you to go out and find more clients like them.

### ***How can you maintain a consistent and full pipeline?***

So often we hear of businesses that are plagued with pipeline inconsistency. It could be that your business is cyclical or that sporadic marketing efforts produce sporadic results. Another reason is not having a central place to store all of your contact, account and opportunity information. A consistent pipeline allows you to plan better and evens out your cash flow.

Most businesses today have to manage with fewer people. Smart businesses have automated many marketing processes as well as putting mechanisms in place that measure marketing results. Customer relationship management applications can be tailored to automate and help manage your workflow so nothing gets overlooked.

### ***How can your company be top of mind with your clients?***

Keeping your name in front of clients simply reminds them of the valuable services you provide. How do you reach out to your client community? Do you send valuable communications? Have you created an on-line presence? Using tools such as blogs and LinkedIn, you have the ability to open up dialogue with your clients. They have the opportunity to comment and give you feedback about your service.

### ***What do you need to take your business to the next level of sales performance and customer service?***

Each business has a unique set of goals. Your next level will be different than another business' next level. Obviously, most businesses have a financial goal. Financial goals can be a direct result of increased client and employee satisfaction. Regardless of how you define what that next level is for you, there are some consistent ways to go about reaching it.

By improving your employees' and clients' satisfaction, you will increase top line revenue, and ultimately your profitability.

Do your employees have the tools to get you to the next level? The right tools and systems can shift a company from good to great. When properly implemented, strong systems will help you achieve that next level you sense is just around the corner for your business.

### ***Are you wondering what to do next?***

For some businesses, it can be difficult to focus on laying the foundation for improvement. It is easy to get caught up with the most pressing issues instead of focusing on ways to move their business forward. Business leaders who are ready to move forward will reach out to experts, someone who can help them move to the next level and jump start their success.

Finding the right expert or product to help you is critical and not a task to be taken lightly. Think about how you hire top-notch employees or how you attract your firm's ideal clients. You probably ask a lot of questions.

Carefully consider the role this expert will play in moving your firm to the next level. Here are some questions to ask:

- Are they interested in being a value-added partner or just a quick-fix problem solver?
- Do they ask a lot of questions to understand where your business is today and where you want to go?
- Do they seek to nurture a relationship with you?
- Do they have other satisfied clients you can talk to?
- Are the products they offer adaptable?
- Do they have a long-term, customer-centric business philosophy that is focused on continued development of results?
- Are they interested in sharing their knowledge with you so you can be as self-sufficient as you desire?

The right company will be able to design a **road map** for you. They will learn where you are today and listen closely to understand where you want to go. They will deliver a foundation on which to build to help you achieve your vision. This road map should come in the form of a detailed project plan with clearly defined goals, objectives and milestones. Once the initial project is completed and you are well trained, they will be there to support you as your business continues to evolve and change, and implement new ideas to continue moving your company forward. Just like the seasons for the farmers, your business will have cycles. Having the right tools in place and the right partner will contribute to your appreciating assets and move you to the next level.

### ***Want to talk?***

Success with CRM Consulting helps businesses acquire, develop and retain profitable relationships. Success with CRM Consulting helps make your business smarter so that you can acquire the clients you were meant to serve, retain the profitable clients that help your business grow; and develop the valuable relationships for long-term success.

Success with CRM Consulting has had the privilege of working with a variety of remarkable clients over the years. With extensive knowledge and experience, we can help refine business processes through the use of technology solutions –Swiftpage ACT! and SalesLogix. We would appreciate the opportunity to learn more about your company and where you are headed. We invite you to learn more about us by visiting our website, reading our blog or downloading one of our eBooks. However, if you are ready to move your business to the next level, please give us a call. We would be honored to be a part of your success.

