Big Business Tools
for the Small Business Market:

CRM applications have traditionally been reserved for larger organizations, where teams of individuals work together to serve and support a common customer base. In today's competitive business landscape, innovative use of technology and information often means the difference between success and failure. More than ever, the small business owner needs the same tools and resources as their enterprise counterpart in order to help the business perform at levels required to maintain growth and profitability.

InsynQ's ALWAYS-ON services give the small business owner a competitive edge. We bring together the technology, and have created the service model that offers businesses of any size the ability to make the most of their available resources. Get more done in less time, and get it done right the first time. With InsynQ, your business is Always On.

Always-On CRM™ and
e-Accounting™
(cpaasp.com)
are powered by InsynQ
Your Computing Utility Company™

CRM stands for **Customer Relationship Management**.

CRM systems are designed to help you identify, acquire and retain customers. In the case of your business relationships, just about everybody you interact with is a customer of some type: a present client is a customer, a past client is a customer (just an inactive one), a prospect is a future customer; a vendor or alliance is in many ways a customer, and an employee or coworker may be an internal customer. Basically, any entity that you interact with can be considered to be a "customer relationship" of your business. Managing these relationships requires keeping data – useful, relative information – about how you interact with these customers, and recording the details that document the entire lifecycle of the relationship.

Traditionally, businesses have employed a variety of software and systems to handle the various interactions with these "customers". Contact management systems are frequently employed to facilitate interacting with prospective customers and sales leads, as well as current and past business customers. Additionally, business customer information is generally stored in the accounting system, where customer billing and other activities is handled along with paying vendors and suppliers. There may yet be additional systems, such as time and billing systems or product or service management systems, where customer information and activity is stored and managed as well.

It is not unusual for a business to store the same data in a variety of places. This is typically done because different workers in the business have differing job functions, and need to interact with different bits of information in the course of their business day. This approach is prone to error or duplication of data, and frequently results in large quantities of unrelated and therefore unusable information. What is required is a single system where all of the data – all the bits of relative information – combine to create a total picture of the relationship on an ongoing basis. Only when this data is converged, combined and presented in a meaningful way does the data become truly useful information.

The entire lifecycle of the relationship starts with the first interaction

Marketing exposes your business and your products or services to your prospective customers. Marketing activities are generally oriented towards the generation of leads – businesses or individuals from whom you may ultimately develop new business opportunities. Marketing campaigns often target large groups, with a goal of gaining the permission to engage in more focused, one-to-one sales activities. When a marketing initiative results in a direct response contact, a new sales lead has been generated.

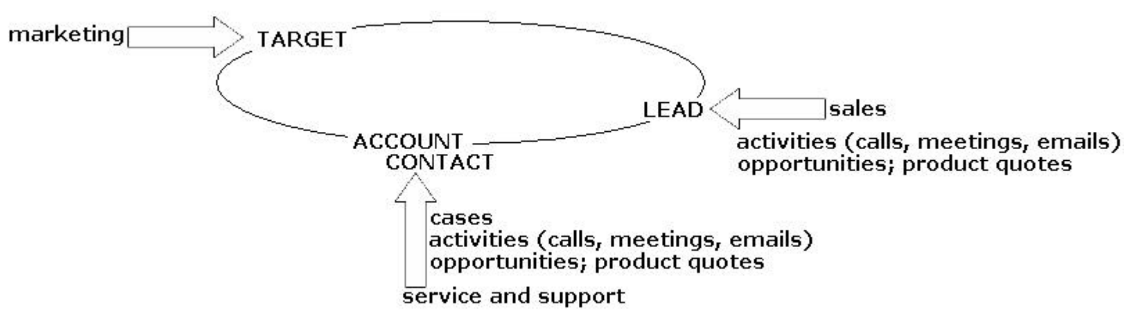
A sales lead is a prospective or future customer. From the first contact to the conclusion of the first account sale, the story of interactions with this party tells the story of how you earn new business and how you create a business customer relationship. These interactions are they key to understanding how and where you are successful in earning new business. Successful interactions may be tracked historically, and often provide a pattern of activities that can be reproduced to generate recurring positive results. Unsuccessful attempts can also be tracked, providing insight for the refinement of the process and resulting in fewer wasted efforts.

A sales lead does not stop becoming a lead just because they buy from you. On an ongoing basis, every customer remains a prospect: a potential source of new business opportunity. The maximum benefit is gained when a business can understand not only when or why their customer buys, but under what circumstances the customer "wants more". Through ongoing interactions – service and support events, billing and account management activities, sales or marketing impressions – the history of activity with the customer reflects the performance of the business and provides a means for measuring success. This becomes the basis for identifying areas for improvement across a variety of job functions and processes within the business.

The flow of information

The Always-ON CRM system is all about relationships. It not only helps you keep track of information about your business relationships and activities, but also helps you understand how that information relates back to your own organization. This understanding of the business comes from the basic structure of your organization – the roles people play and the processes they perform – and helps to govern the flow of information throughout the enterprise. By performing their daily tasks with the information presented, users throughout the organization are able to deliver significant business intelligence and develop new insight simply by applying the Always-ON CRM solution to their efforts.

Different bits of data are collected at various points throughout the business process. As this data is collected, it is related and stored in context. As relationships are created for new data, the entire history of interactions is created. Throughout the CRM system, data elements relate to other data elements to create a comprehensive total view of the lifecycle of interactions.



Marketing CAMPAIGNS are intended to generate sales leads. Marketing campaigns may take many forms, including the placement of print or electronic ads, sending direct mail or email, placing telesales calls, etc. The common aspect of any marketing initiative or campaign is the intended result – generate leads and create opportunity.

Sales LEADS which are generated become TARGETS for ongoing sales efforts. These efforts are the sales ACTIVITIES, including meetings, calls, emails, and other types of interactions. Whether or not the lead has ever done business with your company before, they may still be a target for new opportunity.

Leads which reveal ongoing potential opportunity are usually converted to CONTACTS (individual) and ACCOUNTS (company) records. This provides a means for managing ongoing communications and activities with various individuals within a company, but always connecting that history with the main company account.

Business OPPORTUNITIES are created for leads and contact/account records when there is a quantifiable business potential. Opportunities are frequently created based on information produced in a sales quotation, where certain products and/or services are offered for a price to the prospect. When sales quotations and other potential business is quantified in the form of sales opportunities, sales pipeline reporting and forecasting is generated automatically. Because this information relates to a specific lead, contact or account, the information is available not just for sales reporting but also as part of the total historic activity for the lead/contact/account.

When a contact or account becomes a business customer (e.g., they buy something), there is also likely an ongoing service or support requirement. A support event or issue, also known as a CASE, contains information about the contact and account, as well as the details of the issue and the related product. By storing information relating to support case activities, the company is able to not only understand the requirements to support existing accounts and contacts, but to also understand support requirements that relate to specific workgroups, products and/or services and to measure support performance in those areas.

By tracking the data – from marketing campaign through case management – the business can begin to measure performance in a wide variety of areas, tracking successes and failures alike, and ultimately creating the “formulas” that will equate to profitable business growth.

n# marketing impressions = n# leads

n# follow-up activities to lead = n# conversion to account

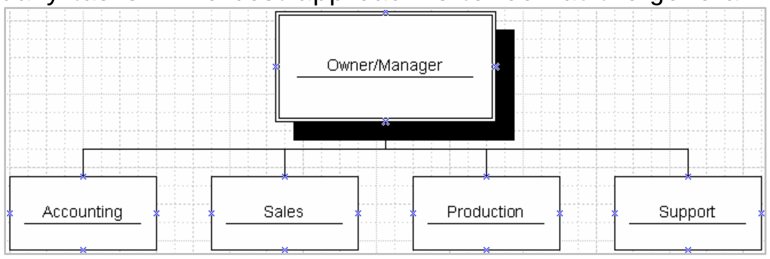
n# follow-up activities to account = n# quotes/opportunities

n% quotes expected to close = n$ sales

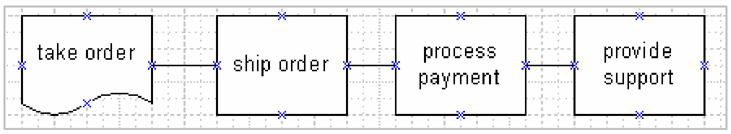
n# products sold = n# support calls

CRM fit for any business

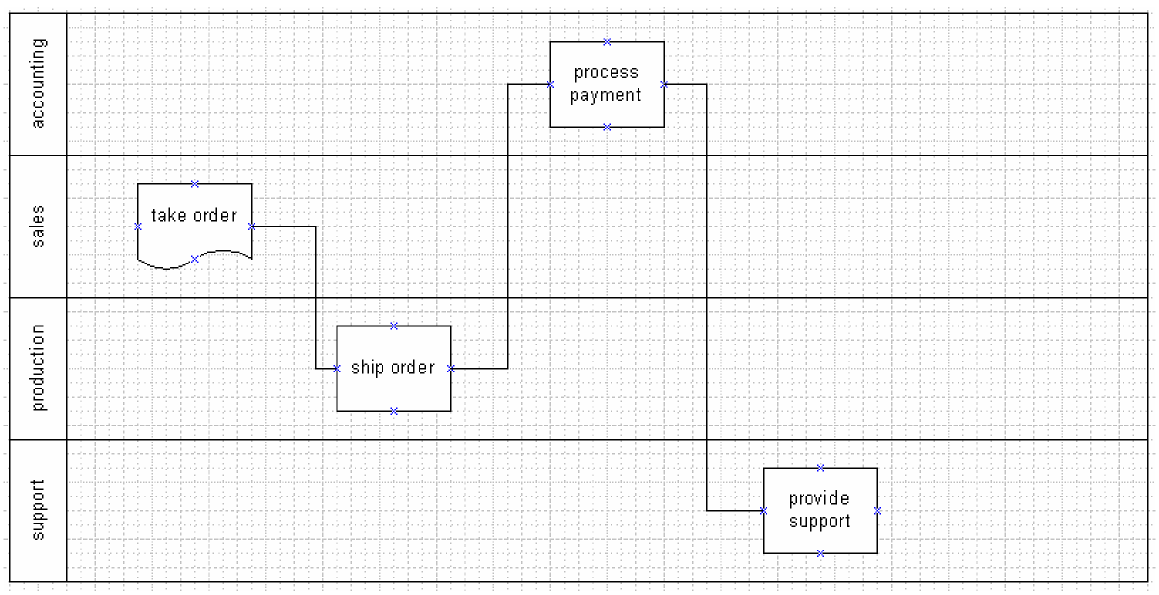
The first step in setting up any CRM system is to determine how the people in the company will use it for their daily tasks. The best approach is to look at the general structure of the business, and then at the "hats" the workers wear. Even in a very small business, all the typical job roles exist even if the tasks aren't broken down to be performed by different people. Create a simple organization chart, but use job names instead of people names. This helps you to understand the roles that play a part in the organization's operation.



The next step is creating a simple flowchart of the basic business process. In general, every business follows a similar high level process flow: sell – deliver – bill – support. There are certainly more details involved, and probably far more steps, but at a very high level this is how the business operates.



The final step is to combine the organization chart with the flowchart, creating a diagram which demonstrates how the roles in the company work together to perform the basic business process. This diagram (called a cross-functional diagram) shows the flow of work, as well as the role or job function in the company responsible for the task.



With this basic framework of information, you now have the necessary details to set up the initial CRM system. This simple framework also provides the basis for more fully exploring the business in detail, gaining a better and more in-depth understanding of the tasks performed and flow of information throughout the organization. Frequently, this type of exploration results in business process "re-engineering", where areas of improvement are identified and greater process or information handling efficiencies are implemented.

It starts with sales

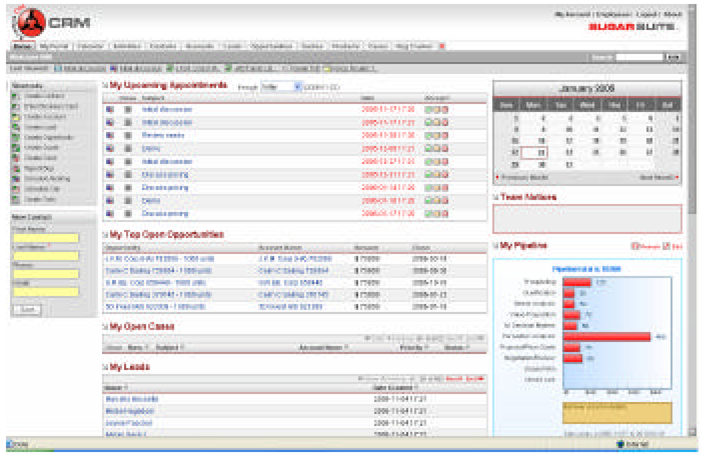
With most businesses, it's all about sales. The sales team has the relationship with the customer. The sales team knows what products and services the company represents. And the sales team brings in the money. Marketing, support, accounting – all are involved in the business. But the sales team is out there, in front. This is why it makes sense to begin a CRM system deployment by focusing on the sales team. This is where the basics of the business process really begin – where your company and your customers first directly interact, and where information gathering is the key element to building business intelligence.

The sales department usually requires access to a broad range of business information and, subsequently, often a range of business systems. For example, current customer and product information may be stored in an accounting system, but sales prospects and contact information may be stored in a contact management system. Further, an email system probably contains contact information as well, and may additionally handle tasks and appointment scheduling, and may or may not be connected with or part of the contact management software. Even with calendar/schedule programs, email, contact management, and accounting system access – the sales team is frequently not privy to ongoing service or support data. This is often handled by yet a different application or system, and may not be integrated with the systems the sales team uses.

Because of the broad range of information required in order for the sales team to truly excel at managing customer and contact relationships, it is desirable to create a system where a total history – including activities from sales, billing, and support departments – may be stored for each customer or account. Because the sales teams also works with non-current customers (leads and prospects), information should be captured as early into the relationship as possible, ideally at the first contact, and identifying the original source of the lead. It typically takes multiple "impressions" to finally drive a sales lead to contact your business. If you can get this information – how many times the prospect saw your add before they clicked on it; how many emails they received from you before they responded; which search engine they used to find your website – you can find out what works; how your customers found you and what they were looking for.

Frequently, certain sales processes can be automated to improve the speed of follow-up, or to more fully qualify a prospect's interests. A simple approach to automating certain sales tasks is to create email templates with standard sales responses. For example, the participants of a particular seminar may receive an email follow-up with more information, or links to product or services offered. Another example might be for leads that request information via your website, replied to with standard product information and specific contact information for their sales representative.

The key is in providing a system which gathers and compiles data while workers simply perform their job functions. While the sales team emails prospects and customers, holds scheduled calls and meetings, and produces sales quotes and orders, the details of their activities are captured and stored. In the due course of handling their daily tasks, users create and add to the data which ultimately becomes the source of valuable ongoing business intelligence. Not only are the results of the efforts documented, but the time and activities are also measured, providing information for activity and performance reporting simply as a result of using the system.



1. Marketing CAMPAIGNS generate sales LEADS and potential business OPPORTUNITY.

2. Business OPPORTUNITIES are created; often based on a PRODUCT QUOTE.

3. A LEAD may be converted to a CONTACT (individual) with an associated ACCOUNT (company) if they qualify for ongoing communication or ACTIVITIES.

4. Ongoing ACTIVITIES may include calls, meetings, emails or other types of contact or interaction.

5. A LEAD is converted to a CONTACT (individual) with an associated ACCOUNT (company) when they buy.

6. A CASE is a record of an event or issue relating to a CONTACT or ACCOUNT, usually relating to ongoing service or support.

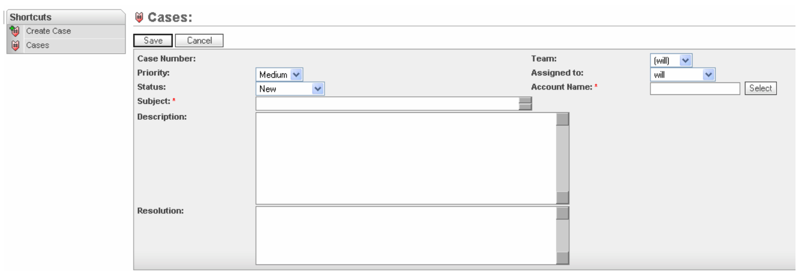
7. A CONTACT or ACCOUNT, as well as a LEAD, may be the TARGET of additional marketing initiatives.

8. New business OPPORTUNITY may be generated from new LEADS, or from existing CONTACTS or ACCOUNTS

Supporting the customer

The support department, or function, is typically the next to be introduced to the CRM system. Once the sales team is entering and updating contact and account data, as well as product quotes and orders, the bulk of the customer information required by the support team is already present. Details of handling issues with customers (pre- and post-sales) are able to be seamlessly stored with all other related history. This allows the sales department to view related customer activities, and have the necessary data to support their efforts. And ongoing service and support activities frequently result in new sales opportunities. With a common system used by both support and sales, this opportunity is able to be more effectively captured and tracked to its conclusion.

One of the most important aspects of providing customer support is documenting the event: the question or problem posed, and the solution presented. This is the best



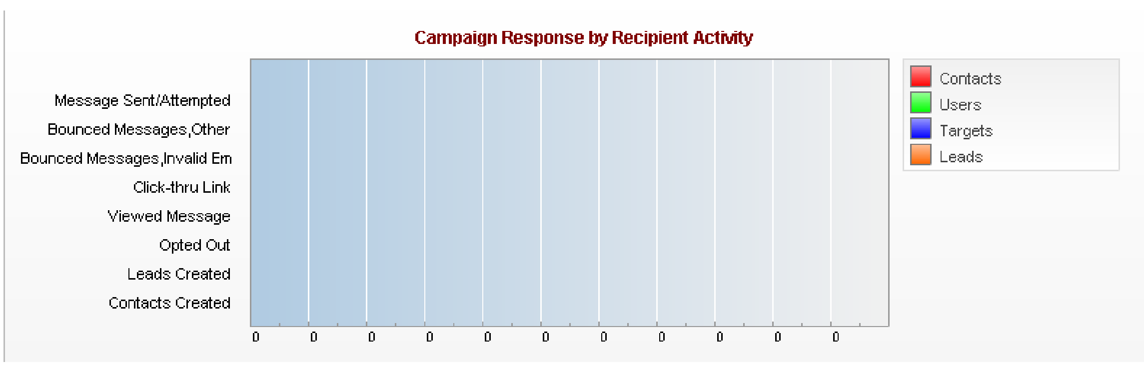
method of capturing redundant or recurring issues, and becomes the basis for creating greater efficiencies in handling customer issues. Certainly, there are “standard” questions or issues which present themselves with each of your products or services. By creating standard support responses to these questions, you can substantially reduce the time your support personnel spend on standard support issues. Further, identifying “standard” support issues is a means to identify potential improvements to be made to the product or service, and thereby eliminating the number or complexity of recurring issues.

Always ON CRM

Driving new business

The front-end of the sales process is marketing. Marketing creates awareness for your products and services, and delivers visibility to your company and brand. Marketing is important to drive new business to your company, but is also important in creating additional product or service awareness with existing customers, keeping them coming back for more. Marketing is measured in terms of “impressions”. Every time a prospective buyer is exposed to your company, brand, product, or service, you have made an impression. Frequently, it takes multiple impressions to encourage a prospect to take action. There’s an old sales adage that says “it takes six to stick”. This means that it takes an average of six impressions – six times the prospect sees or hears something about your company or product – before they contact you. Impressions can come in the form of electronic or print advertisements, direct mail or email, telesales, word-of-mouth referral, etc.

The CRM system offers a variety of tools to help with marketing and sales efforts. A good start is with the implementation of an email marketing campaign, presenting a straightforward means for reaching out to target prospects and tracking the results of the effort. Tracking results is the cornerstone of a managed marketing effort. Creating impressions comes at a cost to the business, and making the most of each impression is the goal of the sales and marketing departments. By tracking in detail the performance of the email campaign, the company can understand whether or not the message is reaching the target market and, more importantly, whether or not the target market is responding to the message. This approach allows for further refinement of the message, and simplifies targeting prospects for more direct selling processes. Through a concerted effort of campaign tracking and sales follow-up, the business is better-able to direct marketing dollars towards real business-generating activities.

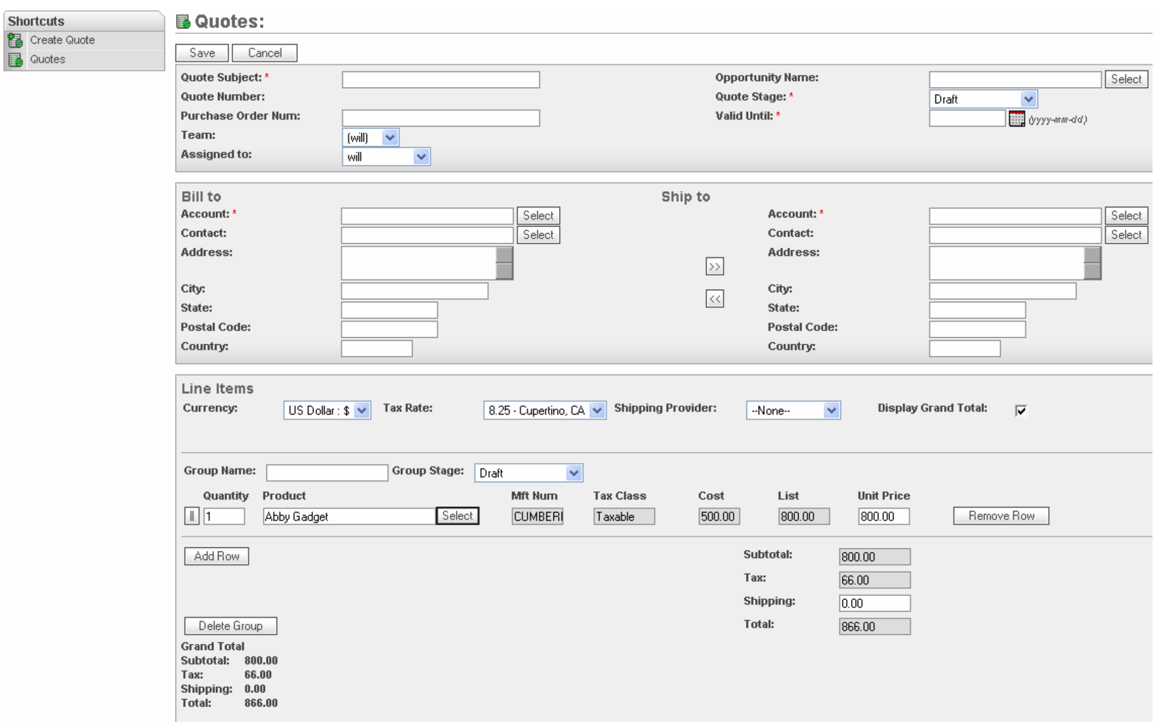


Accounting impacts

While CRM systems may contain comprehensive details of a customer relationship, they rarely contain critical, core accounting data. This is due to the fact that the CRM system IS NOT an accounting system. There are many related bits of data, however, that should be communicated to the accounting system. While there may be some redundancy in the data stored in these two systems, the use of data may be quite different, as well as the processes involved in dealing with it. A simplistic approach to relating the CRM system to the accounting system comes in two primary areas: maintaining customer information and product information.

First, customer information such as address, contact data, etc. should be kept up to date. Customer information is probably stored in the Accounts Receivable area of your accounting system, and much of that basic customer data should also be present in the CRM. The CRM system will also contain prospect and non-customer data, which is typically not desirable to store in the accounting system.

The second type of data that is related to the accounting system might be the products information, which could be similar to the inventory in the accounting system. Products in the CRM system are items available to quote and sell to customers and prospects. Quotes may help the business forecast future inventory requirements, and quotes and opportunities that are won and accepted become sales orders in the accounting system.



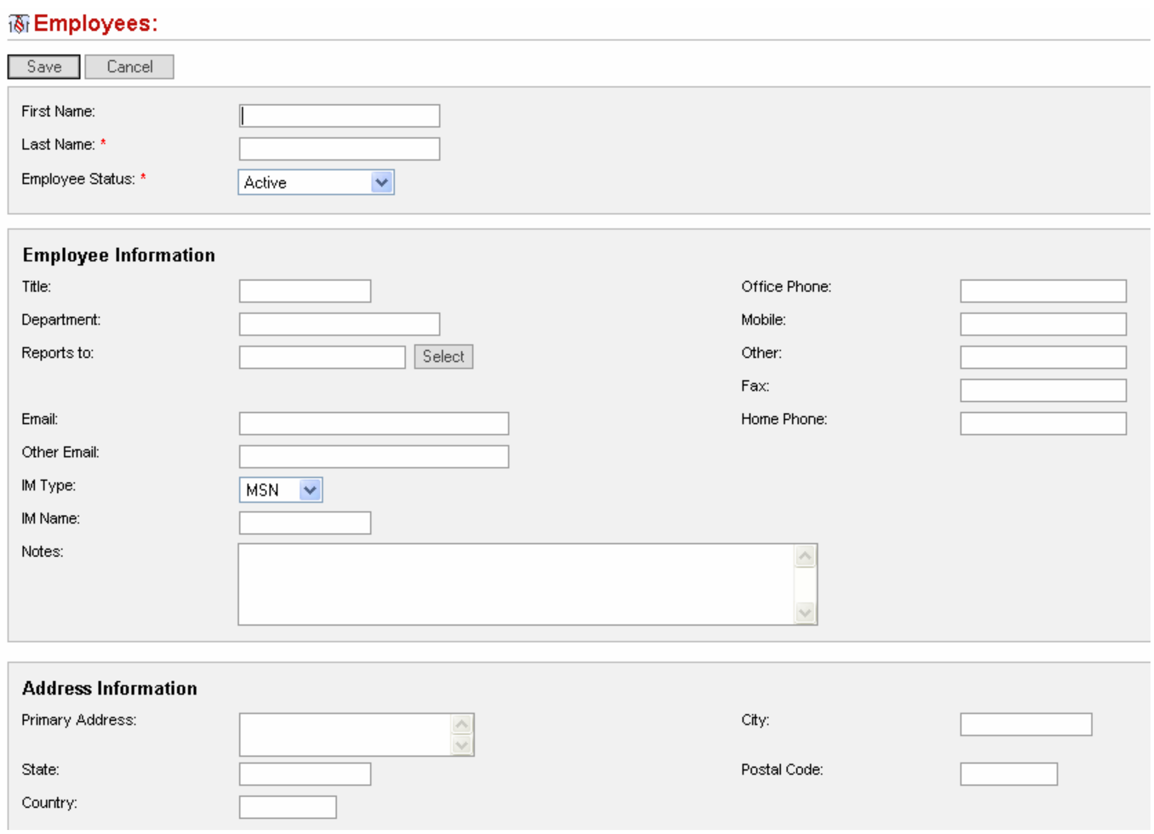
Always-On CRM Setup step by step

There are eight basic steps required to initially set up the Always-On CRM system for use. These steps address the implementation of the CRM application across the entire business at a basic level of operation. As the company and users become more familiar with the system, additional features and capabilities may be setup and implemented as required.

I. Setup employees
II. General configuration
III. Setup teams and workgroups
IV. Define roles
V. Setup users
VI. Create product catalog
VII. Setup inbound email handling
VIII. Set schedules

I Setup employees

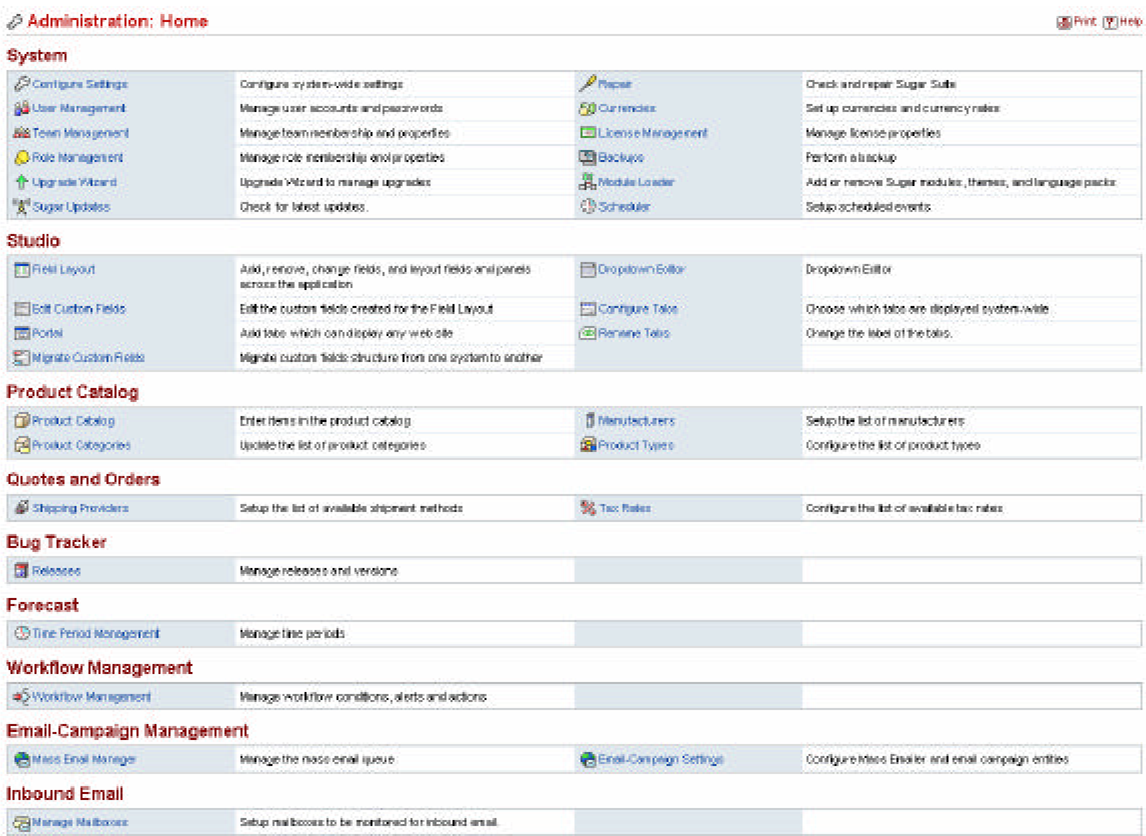
The Always-ON CRM system makes a distinction between employees and other CRM system users. You may have non-employees who will work within your CRM system, these possibly being contractors or outsourced agents. There are a variety of instances where non-employees may interact with your CRM installation. Setting up non-employee users is an Admin activity, and comes further in the setup. If your CRM system users will be primarily your employees, then this is the first element of the system to set up, and is accessed via the **Employees** link.



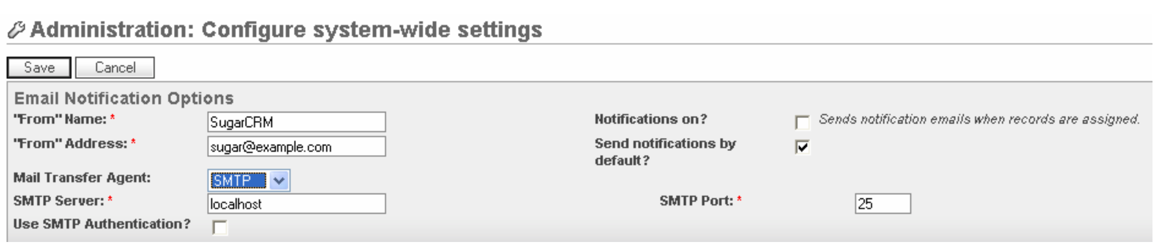
CRM

II Configuration

Once the employee/users have been created in the system, the next step is to perform the Administrative setup of the system, found under the **Admin** link.



The basic requirement here is to setup the global email address and name that the CRM system will use for notifications, etc. You need to know what the settings are for your outbound email server, as well as a valid "from" address to use for notifications. When a record is assigned to a user, the system can automatically send an email to the user with the details of the record. For example, when a new sales lead is entered and assigned to a sales representative, that sales rep can receive an email from the CRM system with the lead details and a direct link to the record.



III Setup Team Workgroups

Teams are the best way to combine or group individuals with similar job functions. For example, having multiple employees in the sales department would suggest that a team called “sales” be created. This allows for tasks, events, and other information of all types to be assigned or collected for the group of people who will deal with it. Teams are simply a way of categorizing users into workgroups for more streamlined assignment of tasks and responsibilities.

IV Setup Roles

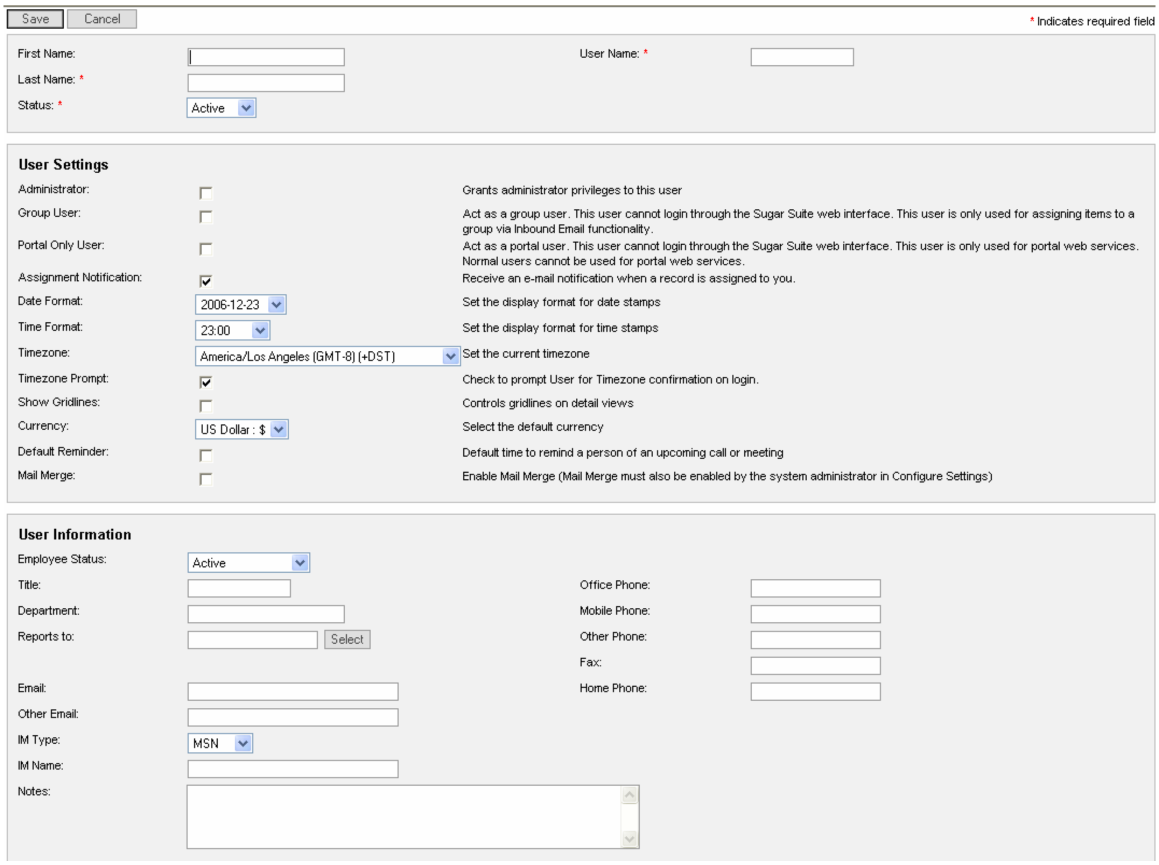
Roles are used to define specific job functions and the information they need access to. For example, a user in customer support probably doesn’t need access to sales forecasting data. Defining user roles is not a required initial step in the CRM setup. Prior to removing any permissions to data or application elements, it is wise to fully understand how the information within the system will be used first. This reduces the chances that you will prohibit a user from accessing the data necessary to perform their job function.

	Access	User Type	Delete	Edit	Export	Import	List	View
Accounts	Enabled	Normal	All	All	All	All	All	All
Bug Tracker	Enabled	Normal	All	All	All	All	All	All
Calls	Enabled	Normal	All	All	All	All	All	All
Campaigns	Enabled	Normal	All	All	All	All	All	All
Cases	Enabled	Normal	All	All	All	All	All	All
Contacts	Enabled	Normal	All	All	All	All	All	All
Documents	Enabled	Normal	All	All	All	All	All	All
Email Marketing	Enabled	Normal	All	All	All	All	All	All
Emails	Enabled	Normal	All	All	All	All	All	All
Email Templates	Enabled	Normal	All	All	All	All	All	All
Forecasts	Enabled	Normal	All	All	All	All	All	All
Leads	Enabled	Normal	All	All	All	All	All	All
Meetings	Enabled	Normal	All	All	All	All	All	All
Notes	Enabled	Normal	All	All	All	All	All	All
Opportunities	Enabled	Normal	All	All	All	All	All	All
Products	Enabled	Normal	All	All	All	All	All	All
Projects	Enabled	Normal	All	All	All	All	All	All
Project Tasks	Enabled	Normal	All	All	All	All	All	All
Target Lists	Enabled	Normal	All	All	All	All	All	All
Targets	Enabled	Normal	All	All	All	All	All	All
Quotes	Enabled	Normal	All	All	All	All	All	All
Tasks	Enabled	Normal	All	All	All	All	All	All

CRM

V Setup Users

Use this setup area to create accounts for non-employee CRM users. At the same time that you create the user record, you can also specify the roles these users play in the company, as well as which teams they are members of (if any). In addition to defining the user based on roles, you may also specify exactly which additional modules and data you do or do not wish the user to interact with. This allows you to be very granular when setting permissions for non-employee users.



Save Cancel

* Indicates required field

First Name:		User Name: *	
Last Name: *			
Status: *	Active		

User Settings

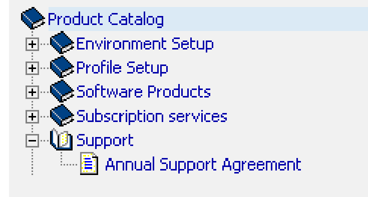
Administrator:	☐	Grants administrator privileges to this user
Group User:	☐	Act as a group user. This user cannot login through the Sugar Suite web interface. This user is only used for assigning items to a group via Inbound Email functionality.
Portal Only User:	☐	Act as a portal user. This user cannot login through the Sugar Suite web interface. This user is only used for portal web services. Normal users cannot be used for portal web services.
Assignment Notification:	☑	Receive an e-mail notification when a record is assigned to you.
Date Format:	2006-12-23	Set the display format for date stamps
Time Format:	23:00	Set the display format for time stamps
Timezone:	America/Los Angeles (GMT-8) (+DST)	Set the current timezone
Timezone Prompt:	☑	Check to prompt User for Timezone confirmation on login.
Show Gridlines:	☐	Controls gridlines on detail views
Currency:	US Dollar : $	Select the default currency
Default Reminder:	☐	Default time to remind a person of an upcoming call or meeting
Mail Merge:	☐	Enable Mail Merge (Mail Merge must also be enabled by the system administrator in Configure Settings)

User Information

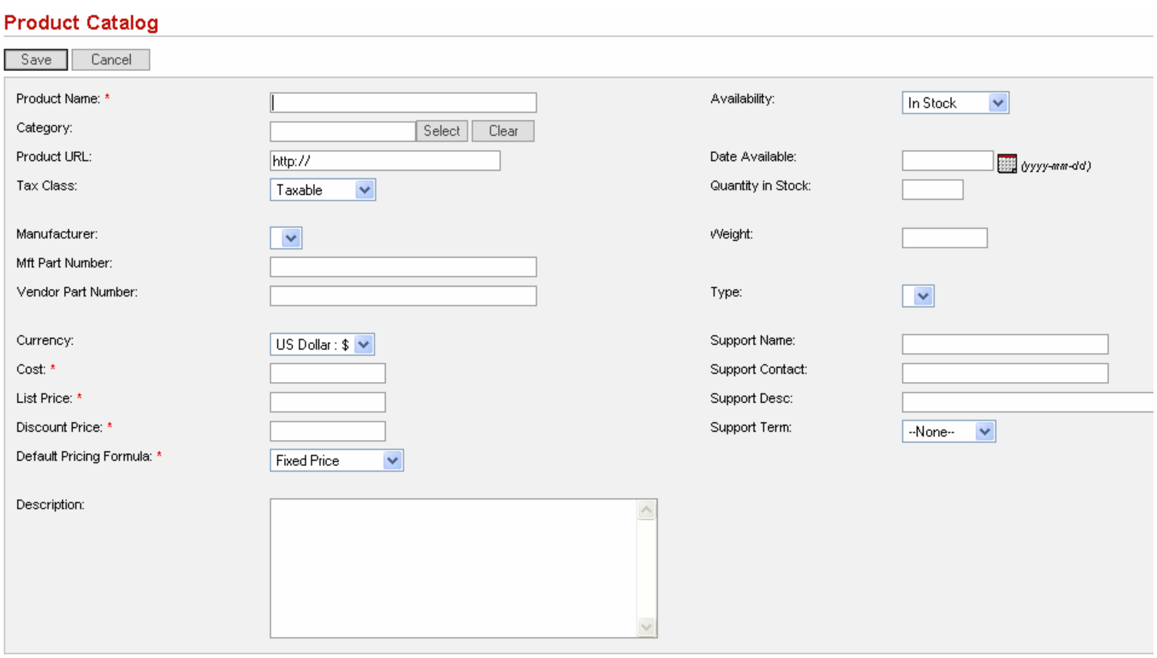
Employee Status:	Active		
Title:		Office Phone:	
Department:		Mobile Phone:	
Reports to:	Select	Other Phone:	
		Fax:	
Email:		Home Phone:	
Other Email:			
IM Type:	MSN		
IM Name:			
Notes:			

VI Setup Products

Always-On CRM offers a comprehensive product catalogue module, containing data for shipping providers, manufacturers, and product categories and types. Setting up the catalog can be as detailed or as simple as desired. Initially, it is a good idea to set up at least an outline of the product categories and types first, as this will make grouping items in the product list easier. These product categories and types create an index which improves the process of searching for and finding products quickly.

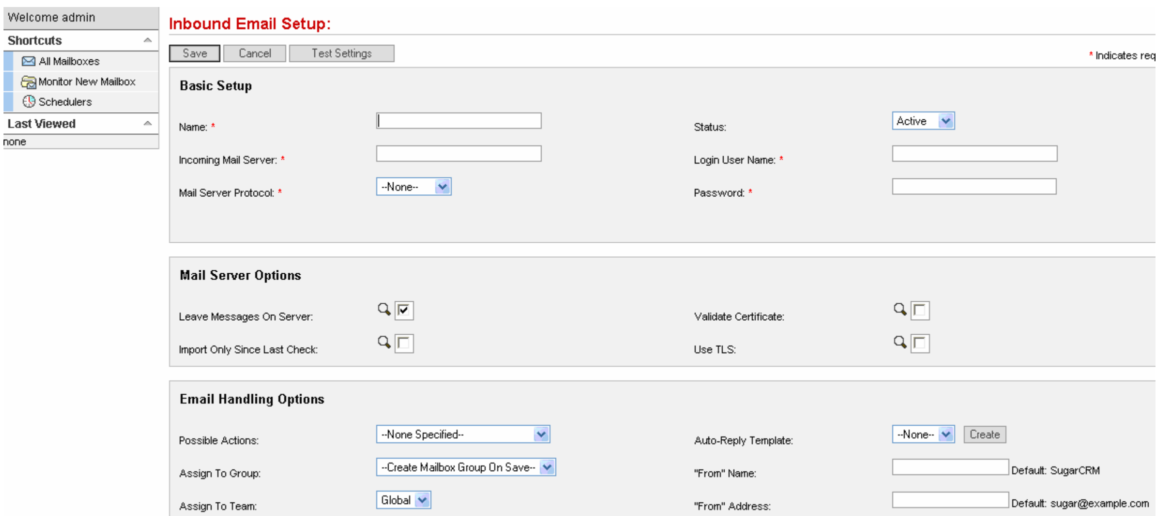


Once the product types (as well as manufacturers and shipping providers, if desired) are created, the process of creating products in the catalog is straightforward. The information required at this point is the product name, and the pricing information for proposals and quotations.



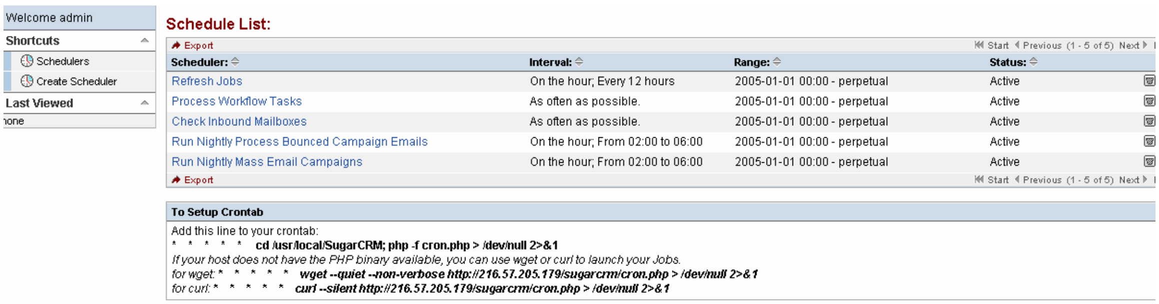
VII Setup Email Accounts

The general company setup and employee/user configuration tells the CRM system how to send emails. But the CRM system needs to also be able to retrieve emails, as well as intelligently handle (as with email marketing campaigns) bounces, replies, etc. Using the manage mailboxes section of Admin, you create the accounts for inbound email handling, specifying the type of mailbox to be checked, whether to leave messages on the mail server, and what actions are to be taken when the email is received. For example, you need a “bounce handling” mailbox to use for email marketing campaigns, so that the mailbox can provide details on emails resulting from the campaign. For a customer support mailbox, you may select to “create case”, so that a customer support event is automatically generated from the email. The email setup also allows you to specify whether these messages are to be delivered to a specific user, or if they will be distributed to a group or “team” inbox.



VIII Set Schedulers

The CRM system needs to know how frequently you want certain tasks updated by the server. For example, you need to specify how often the server will check for new emails; you need to tell the server how often it needs to run email marketing campaigns, and how frequently to update or refresh workflow tasks. At minimum, you need to setup inbound email checking, and you need to setup a schedule to refresh scheduler jobs. This way, as you make changes or addition to the scheduled tasks, the system will refresh the changes and act upon them. Once you have set the schedulers in the CRM application, make sure to have your system administrators update the servers, as well (see notes about *crontab* on the scheduler screen).



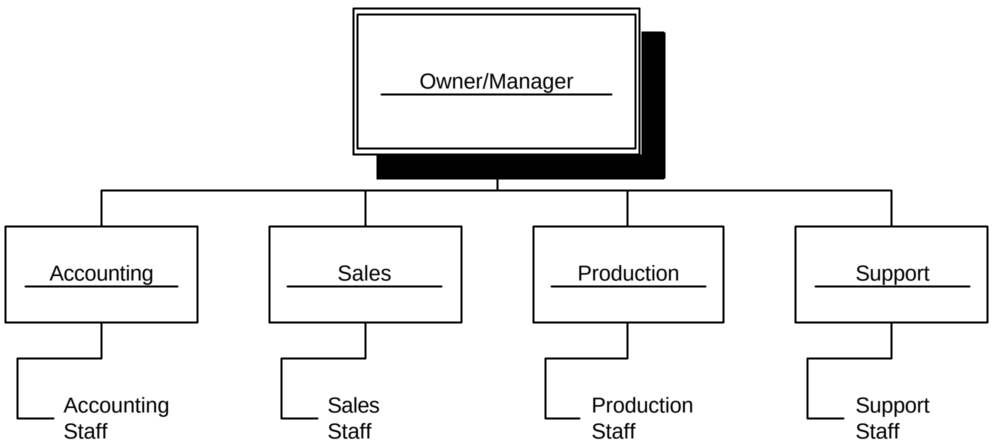
Always ON CRM

Modeling your business…

Step 1 – Organization Structure

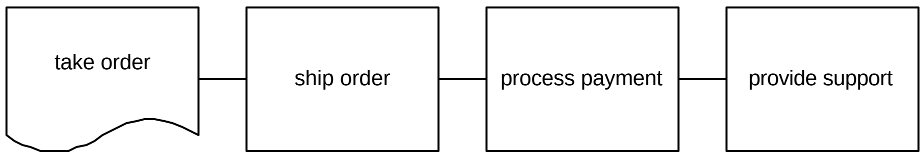
Create an organization chart reflecting the structure of your business. Starting at the top-most position in the company, create a chart demonstrating the hierarchy of management in your organization.

It may be easier for you to think of the management structure in terms of individuals rather than departments or titles, but it is important to focus the organization chart towards the work that people do in the company rather than simply listing all of the employees. This may be especially true in organizations where a few individuals perform a wide variety of job functions.

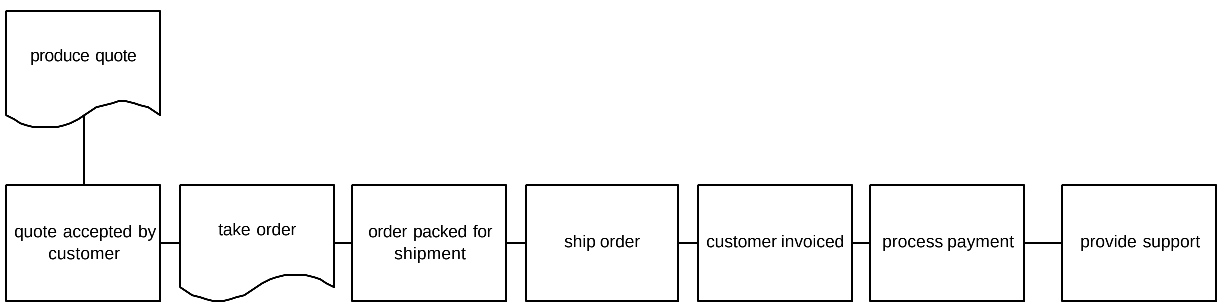


Step 2 – The Workflow

The next step is to create workflows for your various business processes. In most businesses, the workflow can be created at a very high level, demonstrating the basic business processes involved.



As more experience is gained in modeling the various aspects of the business, greater detail may be introduced, providing a more in-depth view of the business operation. While there is benefit from a process engineering perspective to have a very detailed view of your business processes and workflows, the modeling required for a first-phase CRM system should remain necessarily high-level.

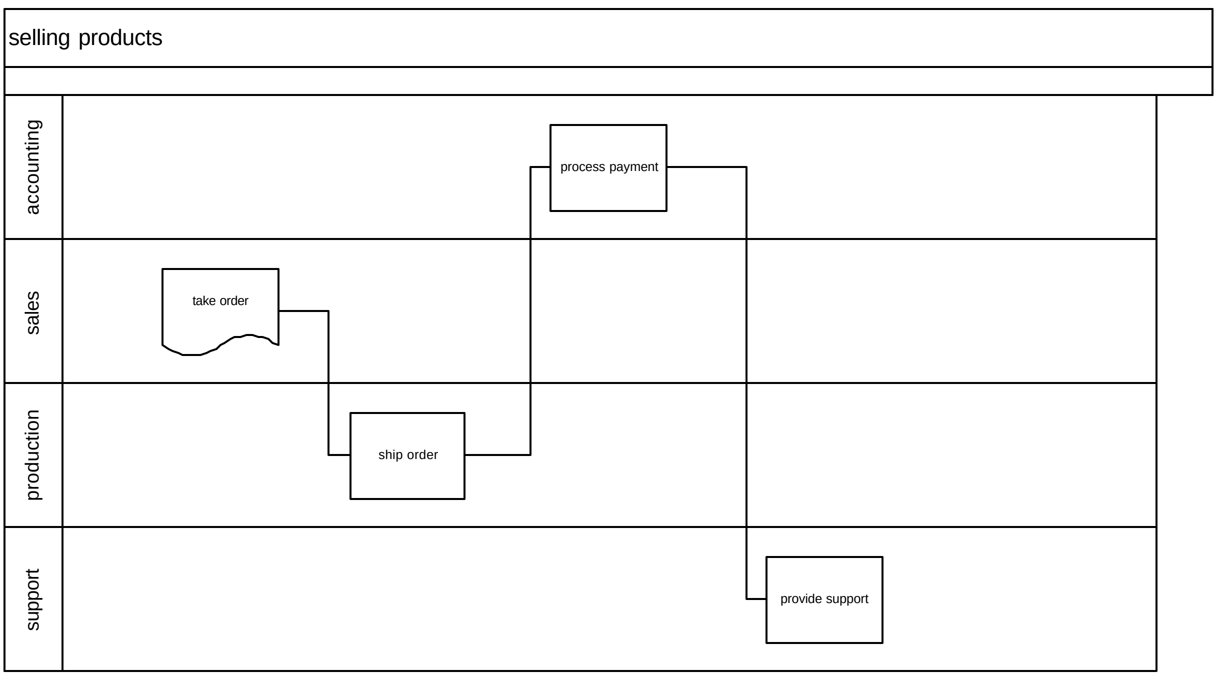


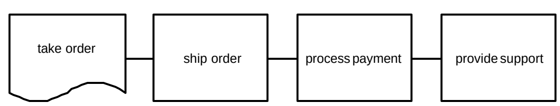
With the implementation of the CRM system comes company-wide information sharing and collaboration. This new resource may help you identify certain processes or workflows that can now be more efficiently handled, and you may be able to reorganize certain workgroups based on the new information management capabilities. This is true with any software or system you implement in your business: you can use the tool to drive improvements in performance, or you can apply it to simply supporting the status quo. The process of improving your operation and workflows is frequently referred to as business process re-engineering, and is a very important step to realizing the full benefit the CRM system can offer. By returning periodically to your diagrams and reviewing the use of information and the workflow, you may be able to identify areas where the operation could be more streamlined and made to more efficiently.

Step 3 – Putting it all together

The final step in completing your model is to combine the organization chart with the flowchart. This combined view, called a cross-functional diagram, reflects how the various roles in the company work together to perform the task, and which role is responsible for each step in the process.

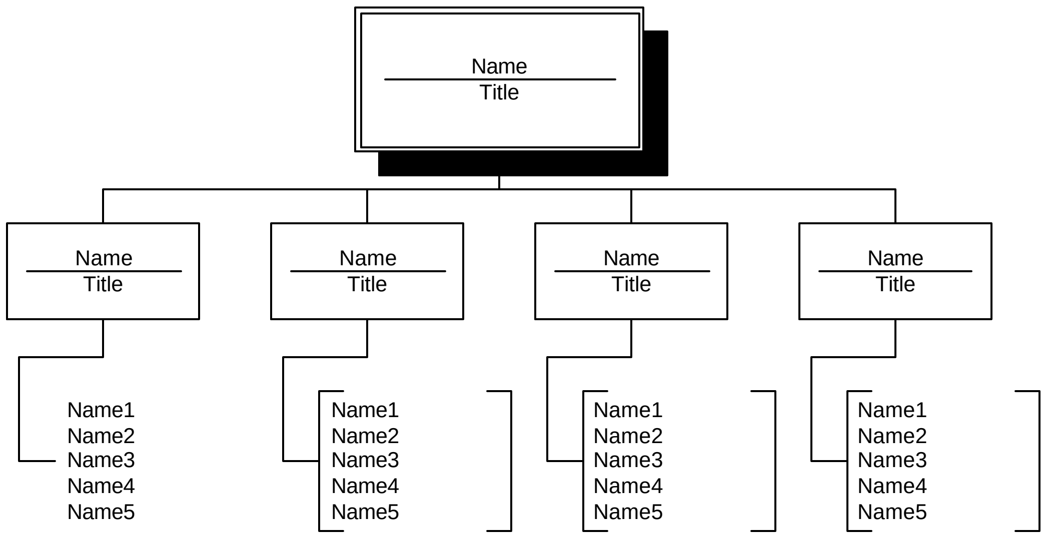
This view is one of the most critical in terms of truly understanding how work is performed within the business. Only by representing the flow of work through various roles or departments in the company are you able to fully understand how and when the different workgroups interact. Interactions between departments or workgroups in the business represent possible points of lost efficiency, depending on how direct the interaction is and whether or not the information required to complete the task is readily available. One of the primary goals of a successful CRM implementation is making information available to those who need it at the time it is required.





Worksheets

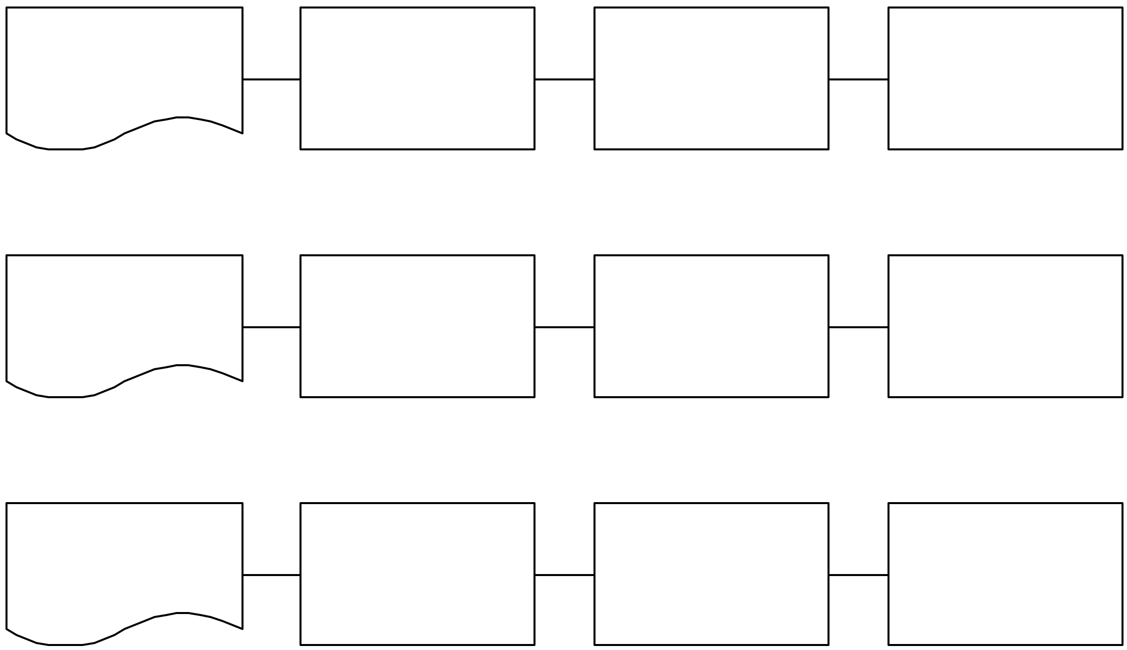
Organization Chart



Employee List with Roles and Teams

Name	Title	Reports to	Email	Phone	Role	Team (workgroup)

Workflow diagrams



Cross-functional diagrams