SystemLink smart

A Quarterly Newsletter for our Clients & Affiliates
**Volume 6**

## In this Issue



### How ERP Can Translate Information into Business Success - FREE Webinar

Thursday, June 10, 2010
10AM PDT / 1PM EDT

How do the most agile, responsive and successful businesses become that way? They effectively leverage what is arguably their most critical resource – accurate, complete, consistent, secure and timely information.

Join us for this webinar and see how ERP solutions can help to transform disparate information silos into coherent, integrated and actionable forms that can improve the operational aspect of your organization. You'll also get advice and practical tips for what to look for in an ERP system in the context of your information needs.

Sign up for this FREE LIVE event by visiting: www.systemlinkonline.com/blog

# CRM Capabilities: It's More Than a Contact Management System

Customer Relationship Management (CRM) systems can provide much more than basic contact management capabilities, but many companies lack the knowledge they need to get the most out of their solution. Using the tools within your CRM program can help you more thoroughly understand your business from a sales, marketing and even operational perspective. Below are just some of the ways you can get the most out of your CRM solution.

**Account Types**
When used properly, your CRM system can assist you in identifying the distinctive demographics of those you do business with.  You can gain this type of detail by simply assigning a 'type' to each account entered into the system. Some examples of types could be: Wholesale Customer; Retail Customer, Web Customer, or Donor, Member, Associate, and so on.  Also, you can add types such as Prospect; Partner; Vendor; Competitor and more. You can make them as specific as you'd like in order to best track different groups. You will be able to easily sort your database and run campaigns directly targeted to those demographics; invite all prospects in a specific city to a seminar, or offer a special to clients who have not done business with you in over a year.

**Track Lost Sales**
Tracking what's not working is just as important as tracking what is. If you don't know why people decide not to do business with you, you won't know how you can improve. As one CEO put it, "The rate at which you are improving your service and offerings is equal to the rate at which you are rising above your competition." To use your CRM solution to help you track lost sales you can add a list of reasons to the account form, and make selecting one mandatory before your staff can move on to the next screen. This will help you research whether it's your prices, offerings, or competitors that are causing lost sales.

**Track Lead Sources**
Know where to target your marketing. Identify your most effective campaigns and successfully tracking your lead sources will help you get the most out of your marketing budget and ensure a full pipeline. Tracking your lead sources within your contact account form will give you the accurate data you need for future decision making.

**Sales Management**
**Do you know how many sales opportunities are currently in your pipeline?** How many expect to make a

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## Who is Beck & Company?

Beck & Company is an accounting and consulting firm made up of Certified Public Accountants and Business Advisors. They provide specialized expertise, creative thinking and unsurpassed service to small and mid-sized organizations and individuals in the Greater Washington D.C. area.

Addressing all aspects of your business through audit, tax, accounting and consulting services, consultants at Beck & Company draw on their combined business background and experience in public accounting to ensure their clients' businesses are able to meet their financial objectives.

With a broad base of managerial accounting and systems experience combined with a deep understanding of business process and technology, Beck & Company is able to provide assistance in the following areas:

- Accounting and Audit
- Tax Compliance and Tax Consulting
- Non-for-Profit Services
- Consulting

**Website:** www.BeckCPAs.com
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purchase in the next 30, 60 or 90 days? Having access to this information can help you greatly when it comes to budget and profit forecasting. To do this, simply implement stages for your sales opportunities within your CRM program.

**Collections**
CRM centralizes all of your important financial and customer data – making it easy for your financial team to get information, track calls, automatically follow up and bring in more cash faster.

These are just a few of the ways in which you can enhance your business through your CRM program however its capabilities are endless. Since your CRM is in essence a central repository of information you can literally use it across the board from improving your marketing to personnel management. A fantastic example of just how much customization is possible through CRM is what we did for the Jesuit Refugee Service.

The Jesuit Refugee Service (JRS) is a multi-national nonprofit organization providing support to more than half a million displaced people throughout the world. They span multiple continents and countries, and had been using a custom legacy system that was unserviceable, not to mention outdated. They needed a very specific solution to allow them to run their operations more efficiently.

We were able to help them through the implementation of a completely customized CRM application. While Sage CRM is a 'Customer Relationship Management Application' on the surface, it also has the capability to be almost anything you need. And what JRS needed was a web-portal with a back-end database that could enable them to provide access to members and regional managers all over the world through one application. We essentially stripped out all of the sales and marketing CRM features and then used the tools within the program to rebuild it from the ground up to fit JRS' specific requirements.

With their new program, the Jesuit Refugee Service can now send regular communications and newsletters to anyone who requests information; take advantage of Sage upgrades; and execute better broad project management. The new capabilities will allow their regional managers to archive and report on all of their projects, goals and annual accomplishments, as well as provide a better communication channel with the Rome office. Sage CRM allowed JRS to automate some very tedious processes and gave them more time to devote to their cause.

### Did You Know?

- SystemLink supports clients using our solutions in over 20 countries.
- SystemLink has been operating for 22 years.
- SystemLink offers Accounting, Tax Compliance and other CPA services though their affiliate company Beck & Company.

### The Greatest Compliment

The greatest compliment we can receive is when you share the positive experience you've had with SystemLink with someone else. The fact that you trust us with your technology needs carries a lot of weight, which is why we ask our customers to share their good experiences with others.

If there is someone you feel would benefit from our services, we would greatly appreciate the opportunity to provide them with the same service and value that you receive from us.

Referring someone is easy. Simply urge them to contact us at 410.825.2120 x8020 or via email at info@systemlinkonline.com. We thank you for your support and for putting your trust in us.

## Meet the Team: Jennifer Bridge

Jennifer Bridge is the Customer Account Manager for SystemLink, but you may know her as the helpful person on the other end of the phone line. She answers all of the 'non-technical' questions and assists clients with varying needs from sending billing information to scheduling conference calls and upgrades. Describing her role, she said, "My job is to help make our client's jobs easier by making sure they are receiving all of the benefits available to them from their SystemLink supported software." Additionally Jennifer serves the SystemLink staff by making sure they have everything they need to serve clients. This includes getting activation codes, coordinating onsite visits or making follow up calls.

Jennifer's background is in sales and service roles with over 14 years of experience in several different industries. She originally began in the Event Planning industry, coordinating events at the National Aquarium in Baltimore and Columbus Center. She later worked in Washington DC as a hotel Conference Services Manager, and then went to work in the Staffing industry, and finally the IT industry when she came to work for SystemLink in 2005. "Of all the positions I've held, my main focus has always been on sales and service."

Outside of work Jennifer enjoys meditation, writing, working out, shopping, and spending time with friends and family, especially her nephews Jackson and Brody. Always up for an adventure she went skydiving in May 2008 and of the experience said, "It was one of the most exciting, intense, peaceful and fulfilling experiences I have ever had."

However, something that is very close to Jennifer's heart is the work she does in volunteering for her favorite non-profit organization. "I am a cancer survivor and I love to give back by helping others through the experience. I volunteer with ThyCa (Thyroid Cancer Survivors' Association), recently was an honorary speaker and participant at the American Cancer Society's Relay for Life in April at Johns Hopkins University.