

**BUSINESS PROCESS IMPROVEMENT  
RECOMMENDATIONS**

**Prepared by**



**FOR**

**COMPANY CONFIDENTIAL**

PREPARER CONTACT INFORMATION

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Now that your new company website is up and running, let us examine adding some value added software and processes to transform, streamline, and grow your business. I will research and identify 3 broad recommendations:

1. a customer relationship management system (CRM)
2. a web-to-lead form
3. an online scheduling tool for customer bookings

### **CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM (CRM)**

Note: QuickBooks does not make or sell their own CRM – therefore I will have to explore other systems that integrate with QuickBooks.

**Lead Management** – Qualifying is the process that allows you to find out whether a lead is actually a prospect. A prospect is someone who has the potential to become a customer. Leads, on the other hand, are just potential prospects. How do you currently handle Lead Management? How do you qualify sales leads? Where are you storing this information? Spreadsheets? Email? Paper? Are you running any email marketing campaigns? Do you follow-up with sales leads via email or phone?

**Customer Management** - Where do you enter and store all your sales lead and customer contact information (for example-name, email, phone #, address...etc.)? How do you handle sales opportunities? What is the workflow of how your estimates become sales quotes and then eventually sales orders? **At the very least**, purchasing a CRM system would be a way to get all your sales leads and sales opportunities into a system that can be visible to other people in your company. A CRM system would not only help your business grow but also be able to support future organic sales growth of your business.

## **CRM Conclusions and Recommendation**

There are dozens of small business CRM systems on the market. Most are priced the same – starting at around \$25/user per month and the prices go steadily up from there. So there is low risk, low initial investment, and can cancel at any time. I looked at how long the vendor has been in business and I did a deep dive into their customer support. Also, the CRM software must have a QuickBooks integration. Purchasing a CRM system will give your company a sales management/pipeline/customer service system. After much research and careful consideration, I am recommending your firm purchases Pipeline Deals ([www.pipelinedeals.com](http://www.pipelinedeals.com)) and see the below information:

- A **simple, easy-to-use**, affordable CRM software.
- **Track your lead's** interactions and stages for companies, clients, and opportunities.
- **Set automated follow up reminders.**
- Use an **email sync** to send targeted mass email campaigns with trackable opens & clicks.
- Track sales activities and revenue with **robust reporting.**

Demo; <https://pipelinedeals.wistia.com/medias/fphpc5j1v6>

Customer Stories; <https://www.pipelinedeals.com/customers>

## **WEB-TO-LEAD FORM**

Now that your new website is operational, I recommend that you set this up to Pipeline Deals CRM.

Attracting visitors to your website is a critical part of digital marketing. Once they're on your site, don't just let them visit once and leave. You can make the most of your web traffic by turning visitors into new leads for your marketing and sales teams to work. That's where forms come into play.

Directing visitors to a form on your website where they enter information about themselves and their interest in your offerings is an easy and powerful way to turn them into leads. A well-designed form can capture key information about visitors, including demographics and specifics about their interest in your products and services. This marketing and sales technique is called web-to-lead.

## **ONLINE SCHEDULING TOOL FOR CUSTOMER BOOKINGS**

I recommend that your company purchase the software: youcanbookme at the following website:

<https://youcanbook.me/>

It is a simple online scheduling tool to eliminate the back and forth emails, with customer bookings straight into your calendar. Allows your salespeople to book time with potential customers and integrates with your email and your salesperson's Outlook calendar. Eliminates your salespeople being on the phone and having to juggle customers or potential customers calling at the same time. Your salespeople can be more productive and not be interrupted while working to schedule appointments.