

Company Information:

Company Name: Point of Activity, Inc.
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Sales and Marketing efforts for small companies need to be well thought out. Most of the time the small business owner is too busy to learn about solutions that may streamline their business, but if you can reach a broader audience of folks who may not necessarily use, but are in the position to promote your product, then you have accomplished what the event was meant to achieve.

Donna Ford, Account Manager

Marketing Idea:

To sponsor a luncheon for QuickBooks ProAdvisors featuring a live demonstration of our product at the Courtyard by Marriott in Greenbelt, MD.

We felt that by exposing our product, Service Call, to QuickBooks ProAdvisors via a live demonstration that it would enable us to “get the word out” to a larger group of people than we could hope to accomplish on our own through other marketing endeavors.

An Interview With

Point of Activity, Inc.
Donna Ford, Account Manager

At a Glance:

- ✓ *Sales and Marketing efforts must be well thought out*
- ✓ *Exposing your product to a group of QuickBooks Advisors via a live demonstration enables you to “get the word out” to a larger group of people*
- ✓ *Develop a guest list*
- ✓ *Plan for a small group (10-20 attendees)*
- ✓ *Event time frame – no longer than 2 hours*
- ✓ *Schedule the event with vacation/holidays in mind*

Planning a Marketing Opportunity:

To develop a guest list, we located Advisors within our area that supported QuickBooks Pro and Premier products, were computer consultants, and worked with clients in the Service Industry.

We then personally contacted the Advisors. The initial response indicated that 20 Advisors were interested in attending our luncheon and live demonstration. This fit well with our goal to have at least 10 – 20 attendees and still have the ability to respond to questions adequately within a two-hour timeframe.

Invitations were sent via Evite. Unfortunately, the response level decreased and securing confirmations required telephone contact. We quickly discovered that we were holding the event at the peak of vacation season, which was the reason several Advisors were unable to attend once we had the date finalized.

Presentation Specifics:

We chose to do a live demonstration of Service Call, which is comprised of three applications, Scheduler and Gatekeeper for the PC and Service Call for the handheld, as if we were a Field Technician out on a Service Call.

We created an appointment in Scheduler and then serviced the customer with a Pocket PC by completing an invoice, capturing a signature, and collecting payment. We then synchronized the handheld and approved and processed the invoice from Gatekeeper directly into the QuickBooks company file located on the PC.

We displayed the demo on a projection screen, which enabled the attendees to see all three components of Service Call, including the actual handheld screen as well as the QuickBooks Company file.

Results

While we only had a total of 7 attendees for the luncheon – it was certainly an affordable and time-conscious method of exposing our product to the ProAdvisor community. Based on their feedback, the event and its concept were very well received. One Advisor even brought the head of her company's IT Department with her.

The Advisors seemed very interested; one requested that Service Call be installed on her handheld and office PC so that she could get a feel for the product and another has become a Reseller.

In our opinion, the QuickBooks ProAdvisor Community is very receptive to new ideas, and we look forward to working more closely with them in the future.

At a Glance:

- ✓ *An affordable and time-conscious method of exposure to the ProAdvisor community*
- ✓ *Event and its concept was well received*
- ✓ *The ProAdvisor community is very receptive to new ideas*
- ✓ *The event was "time well spent"*
- ✓ *Plan to sponsor events on a quarterly basis*

Conclusion:

We learned to never schedule an event like this during prime vacation season and to allow ourselves a bit more time to plan to ensure our attendance goal is achieved. We definitely felt that the event was time well spent.

We hope to have presentations each quarter, not only in the DC, Maryland, Baltimore area, but in other areas as well.

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