



Target Marketing results increase 50-70% with the implementation of Legrand CRM

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Company Information:

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Established: 1992 **ProAdvisor Certification:** 8 years
How long have you been providing QuickBooks Integration services: 5+ years

An Interview With

McWilliams & Associates Inc

Within ½ a day our data was converted and we were comfortable using the system. Now a year later, we could not be happier. All our other systems are automated (i.e. newsletter sign ups, forms from web site, etc) using Legrand as the pillar of our business so we all have access to the most up to date information for each contact.

Bonnie Nagayama, CPA

At a Glance:

1. QuickBooks integration to update customers bi-directional and drill down on sales transactions
 2. QuickSearch available on all fields
 3. Keywords for easy sorting
 4. Work list for targeted marketing and custom lists
 5. Outlook integration
 6. Minimal Learning Curve!
- [See the rest of our top 12](#)

Business Challenge:

We needed a more effective way to organize our contacts that was complete and up-to-date with all critical information. With everyone scattered nationally, it was imperative that the system be easy to use, available real time without requiring sync procedures, and be scalable as we add new products and services.

We were also interested in ways to streamline our operations using the power of technology. Having worked with many developers of third party applications, if information is in an electronic form currently, we were unwilling to accept that it was required that we manually move it from place to another.

By having all relationship details in one place, we can improve client relationships and increase productivity which directly translates into improved profitability.

Finding a Solution:

This issue was critical for two reasons: 1) client/customer service has always been where we excel, and in order to continue to do that, everybody needed access to complete up-to-date relationship information and 2) we offer a variety of products and we needed a better way to effectively do targeted marketing. By not having such a system we were wasting time pulling information from various sources including various computer programs and questions to other team members.

With a couple years of using ACT! and even more specifically a year of using salesforce.com, there was not a way to capture some of the relationship information and for that we did have, we knew the information was in there, but we could not efficiently get it out. As the business continues to grow and expand, we needed software that would meet the needs of our remote users now and into the future.

Add-On Specifics - Installation, Setup & Support:

The installation was quick and easy. A couple clicks and all the QuickBooks contacts can be imported. Our conversion was a little more complicated due to the table structure of the salesforce.com data. But even with that, we had all the data converted and we up and running in ½ day. The user interface is very easy with the ability to change the field labels, so with minimal training (primarily on how we were using some of the custom fields) we were on our way. Any questions we have had have been quickly resolved. The integration between Legrand CRM and QuickBooks requires the Legrand Accounting Link module which adds a choice under File > Accounting. Control as to the direction of the flow of contact information updates, the timing of the financial information update, and more.

Results:

With targeted marketing campaigns based on prior purchases, our results have increased 50%-70%. In fact, with one new product, we sold our entire stock in three days.

My personal administrative time has been reduced by a minimum of 6-8 hours per month since the answers are in Legrand CRM and I no longer have to provide resolution for many questions.

Team members have saved 3-5 hours per month by being empowered to handle issues as they arise rather than playing "phone tag" which has also resulted in much happier clients since their issues are now handled immediately.

Not to mention the significant time that has been saved by eliminating duplicate data entry and extensive training time.

A mini customer case study:

"We have seen a 50 percent to 70 percent increase in results from e-mail campaigns since adding Legrand CRM, due to targeted offers. By applying filters to our customer data, we can pull specific customer lists for email offers. The response from these mailings has been incredible, for one new product, we sold our entire stock within three days."

Closing:

The [QuickBooks integration](#) with aging, notes and sales summary not to mention drill down capabilities on all support transaction types is unparalleled in the customer management arena. That was the reason we originally gave it a second look. Now, the ease of use and ability to work with our other systems means we will never go any where else. The automation we have implemented this year to get our web site and newsletter subscriber base into Legrand has eliminated an additional 10-15 hours of manual re-entry and transfer/import of data each month. The software by itself is great, the QuickBooks integration takes it to the next level, and if you can work with a developer to automate other processes to feed into Legrand through the open table structure, you will be amazed at how it can work for you.