



McWilliams & Associates Finds a Grand Contact Management Solution

Consulting firm boosts productivity and profits with Legrand CRM and QuickBooks.

AT A GLANCE:

COMPANY: McWilliams & Associates, Inc.

LOCATION: Moraga, CA

INDUSTRY: Professional Services

BUSINESS CHALLENGE:

McWilliams & Associates wanted a more comprehensive view of customer activities. By understanding vital customer details, such as purchasing information, account status, and current activity, the consulting firm could improve customer satisfaction, increase revenue through targeting marketing campaigns, and reduce the time the busy owner spent on administrative tasks—freeing her to spend more time working directly with clients.

SOLUTION:

Legrand CRM, Legrand Accounting Link, and QuickBooks Enterprise Solutions: Accountant Edition

RESULTS:

Together Legrand CRM, Legrand Accounting Link, and QuickBooks allow McWilliams & Associates to:

- Increase results 50 percent to 70 percent with targeted marketing campaigns based on customer purchases and activity
- Decrease owner's time on administrative tasks by 6 to 8 hours each month
- Reduce staff's data entry time and time spent playing phone tag by 3 to 5 hours each month
- Avoid double entry of customer information in two systems
- Eliminate three hours of training time for each new contractor

"The information in Legrand and QuickBooks empowers the people I work with to handle things without my direct intervention"

Bonnie Nagayama
Owner
McWilliams & Associates, Inc.



Bonnie Nagayama was more than familiar with customer management software. Since launching her consulting business, McWilliams & Associates, she had stored customer data and sales information in both ACT and Salesforce.com. Neither system met her needs, so she was more than ready to give Legrand CRM a try—especially when she realized how well it integrated with QuickBooks.

Business Challenge

As a small business owner with more 1,500 customers in her database—and no full-time employees—Nagayama needed a robust customer management system. She wanted to give her team of contractors and partners access to essential client information that would empower them to make good business decisions and decrease the time she was spending on administrative tasks.

Past CRM applications had not met her needs. Synchronizing data across all users was problematic with ACT, and Salesforce.com didn't give her the bang for the buck that she expected. "I never felt completely comfortable with Salesforce.com, and I couldn't get the customer information that I wanted," says Nagayama.

Solutions Overview

Legrand Accounting Link, the interface between Legrand CRM and QuickBooks, was the main reason Nagayama selected Legrand CRM. "The integration with QuickBooks was the best that I could find," she says.

Importing her customer accounts from QuickBooks into Legrand CRM was a breeze, she remembers. Now Nagayama, her "virtual" assistants, and her joint venture partners can easily view customer information, including invoices, sale receipts, credit memos, sales orders, and estimates for every customer.

McWilliams & Associates maintains all its customer contact information in Legrand CRM. All new customers are entered into the customer database management system, as well as email and address changes. This data can then be transferred to QuickBooks. Legrand CRM also imports customer balance, credit limit, and accounting notes from QuickBooks. This data is imported into the Legrand database, giving all users access to this information, even those not connected to QuickBooks. With all the data in a single system, Nagayama and her assistants can easily access customer information and history during a call so as to better answer



any questions. And if an invoice is overdue, the team can drill down into QuickBooks to quickly send the invoice via email to the client.

Results

Bringing Legrand CRM into McWilliams & Associates has given Nagayama and her staff a huge productivity boost. They have eliminated wasted time spent entering data in two systems, decreased instances of “phone tag,” and shelved training requirements for new assistants.

Nagayama is saving approximately six to eight hours each month, and her staff is saving about three to five hours a month. Most of this time was spent tracking down customer information and relaying it to the team or updating contact information in two systems. When new assistants come on board, Nagayama can rest assured that they will quickly learn Legrand CRM. Training was not so easy with Salesforce.com, which required the busy small business owner to spend up to three hours to school her new assistants on the system.

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

Nagayama believes that her customers are also receiving better service with Legrand CRM and QuickBooks. Because she and her assistants can easily access information about the customers, they can respond more quickly to customer questions. Overall, Nagayama’s assistants have the details they need to make educated decisions.

“The information in Legrand and QuickBooks empowers the people I work with to handle things without my direct intervention,” she says. “My customers are happier since issues are more likely to be handled on the spot, and I’m happier because I have more time to work directly with my clients.”

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Legrand CRM

www.legrandcrm.com

QuickBooks

www.quickbooks.com

QuickBooks Solutions Marketplace

www.marketplace.intuit.com

Intuit Developer Network

www.developer.intuit.com

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