



## Mentoring Relationships with CRM

Linking QuickBooks data with customer information for a full view

***"We are able to keep track of what is going on with our customers in a way that we haven't been able to before"***

Lisa Lujan  
Co-founder  
Mentoring Minds



### SUCCESS STORY

#### Mentoring Minds

### AT A GLANCE:

**Customer:** Mentoring Minds

**Location:** Tyler, Texas

**Industry:** Educational Tools

**Business Challenge:**

Leading child developmental products supplier, Mentoring Minds, identified the potential for growth through targeted marketing based on past customer purchases. They needed to supplement their existing accounting system, QuickBooks Enterprise, in order to handle post sale follow ups and help them with customer service.

**Solution:**

Legrand CRM CORP Edition  
integrated with  
QuickBooks Enterprise

**Results:**

Mentoring Minds is now able to:

- View sales transactions via Legrand CRM Accounting link
- Increase marketing ROI by targeted promotions based on past customer purchase
- Manage sales leads from initial inquiry through purchase.

### Customer Profile

Lisa and Michael Lujan co-founded Mentoring Minds with the aim of improving learning and development skills with school aged children and young adults via teaching tools and aids focused on both in class and home development. Mentoring Minds dedicated itself to excellence in developing quality educational products that are designed to help teachers teach children to think critically for effective problem solving.

Mentoring Minds has earned a reputation of distinction in the industry, through their hard work and product/service focus with teachers, curriculum coordinators and administrators.

### Business Challenge

As a growing business with up to one hundred thousand customers, Mentoring Minds' only way of viewing or tracking customers was via their accounting system. Mentoring Minds wanted a system that would not only track all incoming and outgoing customer correspondence, relating to both companies and individuals, but needed a companywide calendar, sales leads management facility, and wanted to display accounting figures for those without access to the accounting program. With such a niche market, Mentoring Minds was without an automated means of tracking marketing campaigns, and was unable to measure the effectiveness of chosen strategies.

### Solution Overview

The deep integration between QuickBooks Enterprise Solutions and Legrand CRM was one of the primary reasons Mentoring Minds adopted Legrand CRM as their customer relationship management software package. A major concern was post-sale follow-ups. *"We wanted to be able to keep track of interest in our products and follow up with customers"* says Lisa Lujan, co-founder of Mentoring Minds.

Within the company, Mentoring Minds is now able to pick up where others left off. *"Our company has grown so quickly in a short amount of time, so just being able to track what people are doing is a benefit. For instance, if one employee is working with a customer and another employee gets involved in the situation, they can see what the other one has already done"* says Lujan.

Utilizing the Legrand Accounting link has resulted in time savings via the bi-directional customer accounts interface. *"all of our customers are set up in Legrand and we are able to just push them through to QuickBooks, which is a big time saver"* says Lujan. *"Internally, we have benefited because everything is there for everyone to see and pick up where someone else left off. It takes all of the guess work out of what is going on with a customer. Also, everyone can "view" the information they need form QuickBooks without actually having access to QuickBooks which should eliminate incorrect changes or possibility deletions in QuickBooks"*.



## Legrand CRM

*Look after your #1 Asset: Customers.* **Legrand CRM** is the powerful, easy-to-use customer management solution designed for small and mid-sized businesses. **Legrand CRM** is the complete way to manage your business relationships, grow your customer base and increase sales. Capture web leads automatically and track progress through the sales cycle. Centralize and share customer histories, documents, account balances, and more. Use the powerful group calendar and task assignment capability to keep your team working as one. Customize screen labels and input the data that matters to your business. Integrate with QuickBooks for a complete view of your customers.

We believe that any business wanting to improve their operations using a CRM system should start to see the benefits quickly. A key benefit to **Legrand CRM** is a rapid return on investment. Installation and training is measured in days, not months. Start looking after your #1 asset today.

## Legrand Software, Inc.

Legrand Software, Inc. was founded by Alain Legrand in 2002. With offices in Australia and United States plus an international network of distribution partners, Legrand CRM is sold in 26 countries.

Legrand customer relationship management (CRM) solutions have been designed for easy integration, customization and implementation. The software is both easy to use and feature rich. Seamless integration with QuickBooks makes the products perfect for small and midsize businesses that want a 360 degree view of their customers and prospects.

Legrand CRM is available for businesses with 1-50 or more users. It is Microsoft Windows and Vista compatible. The CORP Edition runs in a Microsoft SQL 2005 environment. Please visit our web site at [www.legrandcrm.com](http://www.legrandcrm.com) for details.

*"We have used Legrand CRM linked to QuickBooks Enterprise for several years and it has played a key role in our continued growth in revenue."*

**Lisa Lujan**  
**Co-founder**  
**Mentoring Minds**

## FOR MORE INFORMATION VISIT:

**Legrand Software, Inc.**  
[www.legrandcrm.com](http://www.legrandcrm.com)

**Quick Books**  
[www.quickbooks.com](http://www.quickbooks.com)

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