

More effective practice marketing

The integrated pack dubbed 'Practice Management Suite' will appeal to those practices that wish to reverse the downward pressure on budgets and margins through more proactively trying to grow their business. Activities include cross selling services to existing clients, as well as targeted marketing promotions. The advantage of the Practice Management Suite is that you can avoid the duplication of effort and inefficiency in using a stand alone CRM solution. All your communication and Workflow management can take place through the front end CRM and all your correspondence (including e-mails and attachments) will be stored in a common document repository.

Describing the challenge, Secure Virtual Office's Bill Duncan says, "20 20 Innovations encourages best practice and more effective business development procedures for accountants. Key to this is adopting new technology, to speed up business process, automate repetitive activities and reduce the drudge."

Suitable CRM capability.

Existing CRM solutions aren't suited to practices' special needs, nor do they optimise interaction between marketing, documentation and client communications. As Flightdeck's Peter Wiggins, explains, "Off-the-shelf 'shrink-wrapped' CRM systems are often too generic and you have to tailor your business process to conform to their limitations. The challenge has been to create practice-focused CRM functionality that combines flexibility with realistic pricing – and seamless integration with an intelligent document management system (DMS)."

A CRM system's strength lies in capturing, managing and commercially exploiting contact data and interaction between the practice, its clients, and prospective clients. Done well, this can build client loyalty, optimise sales, promote effective teamwork and communications, and cut admin costs. Historically, the best CRM solutions managed contacts pretty well, but as tools for managing documents and client communications for marketing and client relationship management, they fell short.

In contrast, a CRM solution integrated with document management does this very well. Therein lies the logic behind Practice Management Suite. It sits atop practices' accounting software, integrates with office applications, and makes it easy to combine accountancy expertise with proactive marketing.



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Use Secure Practice Management Suite to Maximise Team Productivity and Profits



Transform how you develop your business

With one application you can now transform how you build and manage your business for new and existing clients.



Maximising opportunities

"Unlike other CRMs, Flightdeck is fundamentally configurable – as we've already proved for professional services firms. Practices can customise every field, label and form, use their own vocabulary and collect the information they require – not the data dictated by the CRM designer."

Peter Wiggins

Bill Duncan says, 'SVO is an IT solutions provider. We are always looking out for best in class and spend a lot of time bench marking and evaluating applications as they come to market. By using a common SQL database we believe that Flightdeck and DocuSoft have come up with a unique and highly effective solution. Although we are launching it initially to 20 20 Innovations members, we know the new application will be a winner in any market sector. We support traditional 'on premise' solutions but we know we can provide a cheaper and more reliable service by hosting applications in a secure enterprise class data centre using our cluster of high speed servers. We know more and more businesses will migrate toward an OPEX Cloud based solution over the next few years and we expect accountants to be at the forefront of that move.'

On-premise or In the Cloud, the benefits are considerable, as Peter Wiggins explains: "The Practice Management Suite helps practices manage client and prospect relationships, maximise opportunities to develop new business and say goodbye to limiting 'silo mentality' in the face of cross-selling opportunities. With the

information they need at their fingertips, employees enjoy better control of client interactions and avoid the embarrassment of failing to differentiate between different clients and prospects. There's the benefit of getting on top of mountains of paperwork too. From client records to marketing plans, the Practice Management Suite opens up exciting, profitable opportunities."

"All DocuSoft's established benefits are present. These include more efficient business processes and client service, fast access to documents with powerful searches, elimination of lost files, reduced file storage, email management and automatic storage with paper documents, better compliance, and improved document security."

Whether in the Cloud or on-premise, the future looks bright for both the integrated solution and professional practices that harness its power. The scalability, scope for infinite customisation and ease of integration with other applications and websites means the practice management suite can be structured exactly how practices want from the start – the only limit really is their imagination.

Professional practices have traditionally been strong on their discipline, but not so good at self-promotion and business development. The tight economic conditions are causing accountants and professional services firms to rethink their position in the market place, retain loyal customers and attract new ones. A key starting point is to improve quality and timeliness of communication. More enlightened firms are already using modern Document Management solutions. This new integrated solution brings in rich new functionality to cope routinely with communicating with businesses in target markets and help with the process of converting Prospects into Clients.

Endorsed by the ICAEW

Flightdeck CRM, DocuSoft and Secure Virtual Office are established players with strong track records and long lists of large and small customers. DocuSoft is also endorsed and highly commended by the ICAEW.

Combining proven applications

Combining proven Flightdeck and DocuSoft applications enables practices to data-mine client and prospect relationships, cross-sell and address wider audiences more effectively from within a single environment with an intuitive user interface.

Common SQL Database

The well respected DocuSoft Document Management solution has been integrated with the equally well regarded Flightdeck CRM solution to provide a unique tool to facilitate professional services' marketing.