



GrowthForce Case Study:
**QuickBase Manages Customer
Relationships for GrowthForce, While
Integrating with QuickBooks**

QuickBase Case Study

Situation

GrowthForce, an outsourced controller and bookkeeping service, has grown rapidly since its founding in 2004. Starting out with just two employees, the firm now has 23 staff members on payroll. The number of GrowthForce clients has increased exponentially as well. As the company has grown, so have the demands on tracking and organizing its customer contacts.

Until recently, GrowthForce had been keeping tabs on its client information via spreadsheets and paper files. With multiple people handling accounts, information was spread across departments. Not all employees had access to the client data. Customer updates were conducted through labor-intensive team meetings, emails and phone calls. When it came to client relationship management, not all employees were on the same page. GrowthForce needed another way to manage customer relationships.

Solution

As a QuickBooks Pro Advisor company, it was natural for GrowthForce to turn to an Intuit product for a solution to streamlining the gathering, tracking and sharing of customer information across company departments.

That product was Intuit's QuickBase, a new Web-based software that manages and stores information on client interactions, jobs, service items and sales. QuickBase can manage any data that must be captured and disseminated across a company. The software provides more than 200 templates, which can be customized to any business.

Customer Relationship Management (CRM) software is not new, introduced to the business world in the 1990s. But until now systems have been expensive and complex. QuickBase is unique in that it is powerful, yet affordable for small business.

The software starts at \$249 per month for ten users. It is easy to use so there is no need for an in-house IT specialist. As a testament to its effectiveness, QuickBase has received PC Magazine's Editor's Choice Award for online databases.

Results

With QuickBase, GrowthForce now has a single place to look at all client issues. They can get a central view of all client contacts and data, plus it is a scalable solution, which can grow with the business.

In addition, the labor savings are significant. GrowthForce estimates they save at least 35 hours per week in project management and scheduling time by foregoing one-on-one discussions, team meetings and unnecessary client follow ups. QuickBase has replaced a much more expensive, less flexible Professional Services Automation system and existing CRM software.

Profile

This is translating into improved customer service as tasks no longer slip through the cracks. QuickBase has helped GrowthForce improve its internal processes. The program has also solidified a culture at GrowthForce which requires specific procedures be followed with every client contact.

Employees can better coordinate customer contacts and are held accountable for their client responsibilities through QuickBase. Connecting teams leads to increased employee productivity, less administrative work and lower overhead. A centralized system keeps everyone in the loop – including managers who can more readily spot potential issues.

GrowthForce was so impressed with QuickBase that the company signed on as the first **QuickBase Certified Intuit Solutions Provider** in the Houston area. As a QuickBase business consultant, GrowthForce provides software as a service tailored specifically for its customers and its business partners' clients.

GrowthForce can now build QuickBase systems and integrate them with clients' existing QuickBooks systems. QuickBase can import clients, jobs, service items and sales revenue information directly from QuickBooks – avoiding duplicate entry of data that would be necessary with other customer relationship management software.

CITOC, a Houston-based IT services firm, is one of GrowthForce's business partners that has shared the news about QuickBase with its customers. "Our technology clients have been looking for a Web-based solution that tracks time, manages prospects and projects, and is integrated with QuickBooks," says CITOC President BJ Farmer "When GrowthForce told us about QuickBase we immediately were able to identify some clients that would benefit."

GrowthForce Process Analyst James Cosman concurs that there is a demand for QuickBase. Cosman is a Certified Level One QuickBase designer and GrowthForce's lead consultant on how to build business processes through QuickBase and integrate them with QuickBooks.

"The power behind QuickBase is that it's so flexible," states Cosman. "As an online information management system, it can be used for project management, human resources as well as customer relationships. We look forward to using it to manage all our processes from sales to customer relationships."

Another benefit of QuickBase is the ability to customize the system to a particular business, unlike competitive CRM systems such as salesforce.com, Quick Arrow or even Excel spreadsheets. For example, QuickBase can be set up to generate automatic reports to managers, which flag variances in key performance indicators or delays in project workflow. A report can be set up so that if a job gets within ten percent of its budget, management gets an email and they can then warn the client. "With QuickBase, you feel that you have more control over a job, and can get help quicker," observes Kristy Conrad, GrowthForce project manager.

From a business owner's standpoint, managers automatically get weekly management reports in real time and can drill down on the reports to get more detail. "With Quickbase, managers can have a lot more confidence in the data generated by an employee because with a click of a button they can see a detail report," Conrad explains.

One of the popular features of QuickBase is the Task Lists. Managers can assign tasks via QuickBase instead of sending an email, which could be deleted or missed. Task List items, which can be sorted by priority and person, do not go away until the employee completes the task.

Process improvements are the most obvious benefit of using the software. Conrad gives an example of how QuickBase has changed the way GrowthForce handles work orders. Prior to QuickBase, a sales person would email a sales order to an administrative assistant who would then generate a work order. If the admin needed clarification, there was a “back and forth” dialog with the sales person, taking time away from revenue-generating activities.

Now work orders can be generated directly by the sales person via QuickBase. “It makes you question whether a process is the most efficient way to do something,” notes Conrad about how QuickBase has affected employee productivity.

CRM programs often fail because after the software installation employees are not provided with a full understanding of how to implement the information systems. Not so with QuickBase. “It’s easy to use; you don’t have to have an IT background to use it,” notes Conrad.

For more information, please email info@growthforce.com or call 281-358-2007. GrowthForce would be happy to show you or your clients how to benefit from a CRM system that is integrated with QuickBooks or provide outsourced bookkeeping and controller services to help improve your business’ productivity and lower overhead costs.