



Set Yourself up for Success with CRM and Marketing

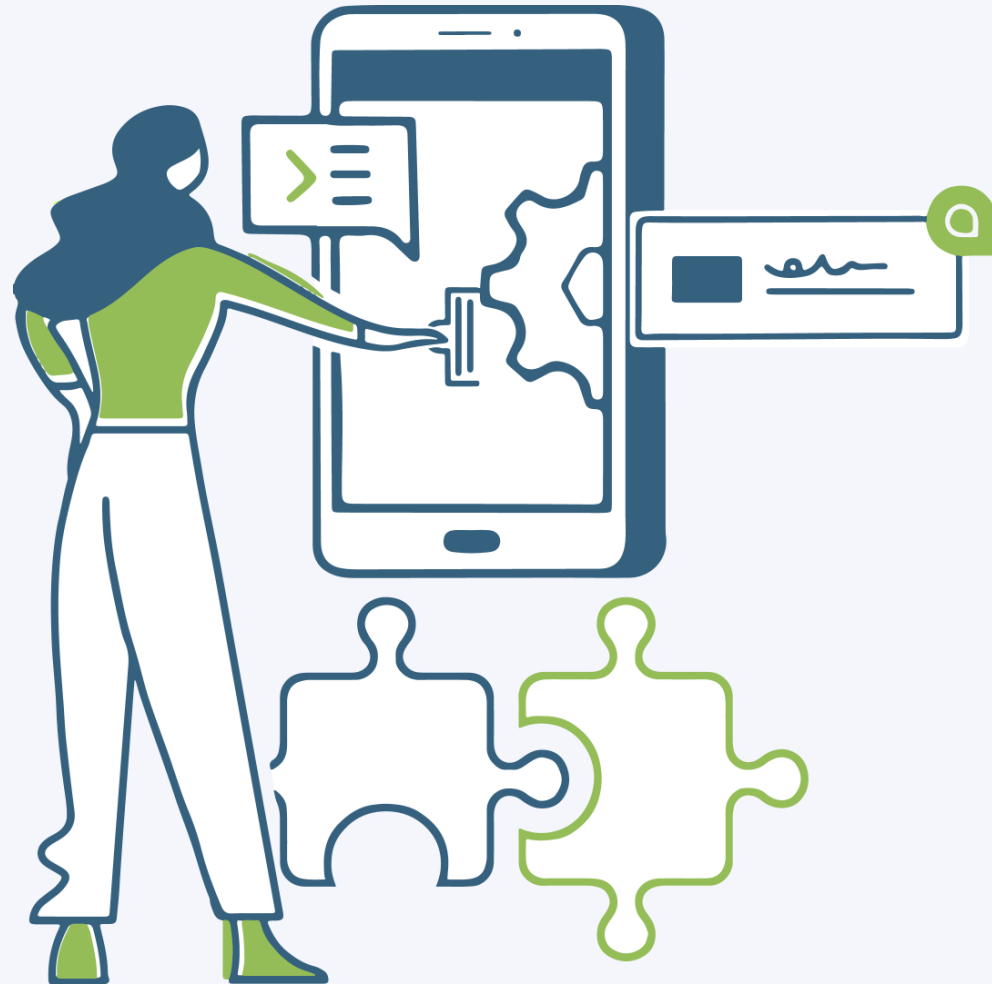


Presented By Natasha Dubauskas-Reed & Christie Dillon, Customer Success Specialists





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TEAM

Natasha Dubauskas-Reed

Customer Success Specialist

Natasha is part of the Customer Success team at Actionstep. Having come from the legal industry Natasha has a wealth of experience in how to use Actionstep to obtain the maximum benefit for your law firm. She is more than willing to offer expert advice, hints, and tricks – feel free to reach out to her at natasha.dubauskas-reed@actionstep.com.





TEAM

Christie Dillon

Customer Success Manager

Christie is part of the Customer Success team at Actionstep. She works with clients to help them optimize usage of Actionstep's software solutions so that they improve productivity and achieve their business goals. Prior to joining Actionstep Christie was a strategic partnerships manager for a video assessment software company – feel free to reach out to her at christie.dillon@actionstep.com.



What is CRM?

What is CRM – Customer Relationship Management

Good Customer Relationship management comes down to two main things:

- Delivering value
- Communicating well

There is no single feature in Actionstep that allows you to achieve good CRM, but rather a combination of features and configuration options that work together to create a platform for good CRM. Automation is one part of the solution, and the other part is attitude and culture.



Communicating Well

Actionstep provides a wide range of features that make it easier to implement a top-quality communication plan:

- One of the simplest and most effective ways to improve client communications is to include an automatic email to the clients at each step-change in the workflow;
- Actionstep's document and email templates allow you to generate professional-looking, and accurate documents each time you communicate with your clients;
- Good recordkeeping allows you to instantly respond to client requests, and within each Action you will find the relevant File Notes, current Step, next Steps, related email, calendar appointments, Tasks, billing, and documents at your fingertips.



Delivering Value

Whether you provide a product or a service the key to customer satisfaction is to provide that product or service:

- on time
- with the right quality
- at a fair price

Workflow is the key to providing your product or service on time and with the right quality. By setting up an appropriate set of steps, tasks and alerts for each work-stream you can ensure that every job follows the correct process and timing. Task due dates, Action priorities, and alerts will notify team members of where they need to focus their attention.

Actionstep cannot set a price for your products or services but it can provide you with the necessary information to reach the correct decision. By analyzing the Steps, Tasks, Time Records and expenses for each job, you can get good insight into what it costs you to produce each product or service, and from that you can set an appropriate margin to arrive at a fair retail price. By analyzing the workflow data you will often be able to find more efficient ways of doing things, which can reduce costs and allow you to either lower your prices and/or increase your margin.



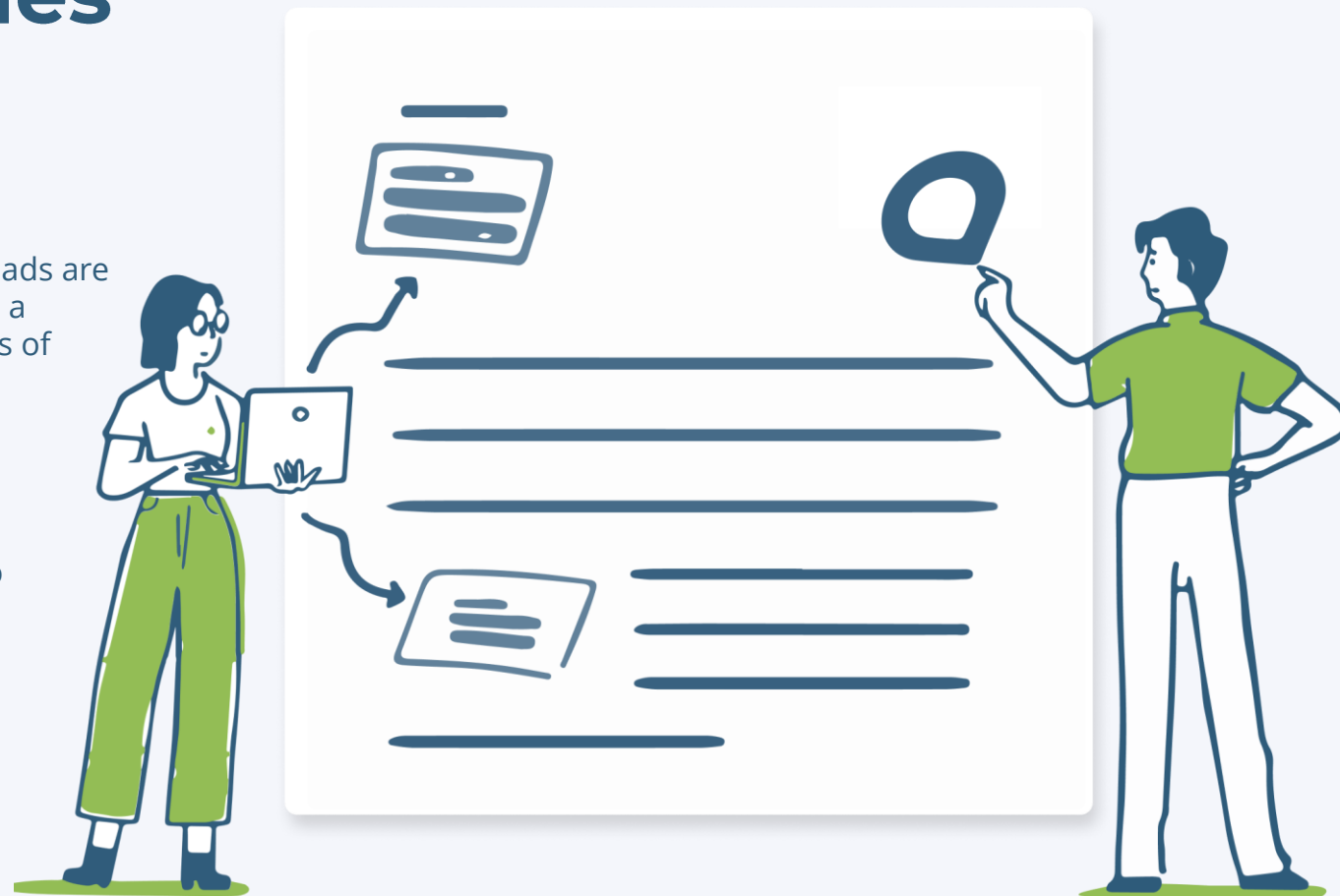


MARKETING

Marketing Activities and Campaigns

The lifeblood of all business is sales. Setup your marketing activities to find out where your sales leads are coming from. Once a prospect contacts you follow a structured sales workflow to improve your chances of turning them into a paying client.

Marketing Campaigns and Activities tell us how our customers have found us and they link any income we receive through different channels into those activities, so that we know what activity is bringing us income.





Questions?

**Now is your chance to 'Ask an Expert' –
comment questions in the chat section**