



Consulting Services, Inc.

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Sage Insights 2009 - the annual conference for Sage Software is now history. This year we were back in Nashville for a week at the Gaylord Resort - simply beautiful, it seems like a hotel in the middle of a rain forest, All my e-mail has been caught up, my desk is clean again and all of my calls have been returned.

It was a week out of the office but it was great to connect back up with old friends and business associates. A gentleman I knew many years ago once told me that the only reason he goes to conferences is to find out who he can work with in the future. So true... sharing a dinner table tends to bring out the 'real' in people.

Here are the three big things that I came away from the conference with that will help your business in the coming year.

1- Social Media

If you are not yet on FaceBook, LinkedIn, Twitter (the top three) you really need to be moving in that direction. Virtually every conference track - Accounting, CRM, HR - had several sessions on how to make Social Media work for you and your customers. And what we see today is early in the cycle ...

As these services (notice I didn't say products) mature and expand we will be using them more and more for marketing and customer service. It wasn't too long ago that having a website was considered unnecessary. If I had a dollar for every time I have heard "who would ever go on the Internet to find us", I could take all of us to lunch.

2- Database Reporting

I am firmly convinced that there is 'gold in that thar database' that has yet to be mined. Take a quick look at your customer database - who is in your top 20%? And is that is sales or profitability? Who is in the bottom 10% and why are they not buying more? Where did your business come from last year? Where did your new business come from?

All of this information should be readily available in your customer / sales / CRM database. If not, it might be time to change to something that will help you manage your business.

3- Business Activity Monitoring

Getting the right information to the right person at the right time is the goal of activity monitoring - sometimes called business alerts. With all the technology we have at our command, management by exception should be



the rule.

Simple things, like sending each sales rep their daily call list and opportunities they are working on each morning by e-mail. Or notifying a sales rep the day before a meeting with a customer that the customer has several service tickets open - or that the customer is close to or over their credit limit.

The items above are certainly not anything new or earthshaking. They are things that we either are or should be doing already. In many cases it just a matter of expanding a little on the technology we already have in place.

Warm regards,

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