Partners Together For Better Solutions

IDN Advisory Council

Legrand CRM facilitates better business decisions.

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Company Information:

Company: Legrand CRM Software Inc.
Contact: Andrew Muollo, andrew.muollo@legrandcrm.com
Website: www.legrandcrm.com
Hours & Time Zone: 8:30am – 6pm PST
Established: 1999 **IDN Membership:** Premier, 2003
QuickBooks Integration: 2.5 years
Integration with other software: MS Office

An Interview With

Legrand Software Inc.

"We have seen a 50 percent to 70 percent increase in results from e-mail campaigns since adding Legrand CRM, due to targeted offers. By applying filters to our customer data, we can pull specific customer lists for email offers. The response from these mailings has been incredible, for one new product, we sold our entire stock within three days."

Bonnie Nagayama, CPA

At a Glance:

- *Companies/Account management*
- *Contact management*
- *Marketing Events & Campaigns*
- *Business Opportunities*
- *Shared Group Calendar*
- *Outlook Interface*
- *Microsoft Word mail merge*
- *Data Synchronization*
- *User Rights*
- *Customer Service Optional Module*
- *Item Tracking Optional Module*

Why was Legrand CRM developed?

The intention of Legrand CRM is to facilitate better business decisions and customer relations by collecting, storing, analysing and having data at the business' fingertips such as contact management, opportunity analysis and storage, forecasting and other functional operations such as campaign management, task management, customer service, and reporting.

Who is Your Target Market and Why?

Any small to medium company that has customers has a use for a CRM system. CRM is meant to assist companies grow and manage their customer base.

Many people see this as purely a tool for salespeople, but a good CRM system can have many more uses such as managing client projects.

How does Legrand CRM Work?

Legrand CRM is a desktop application that accesses a centralized database; there is no limit of users that can access the database. Legrand uses two database technologies for its three products, STD and PRO use a file sharing Visual FoxPro database while the CORP edition uses MS SQL, a true client / server technology.

Who is your competition and how does Legrand CRM differ?

ACT, Goldmine and Maximizer.
Legrand's CRM solutions are intuitive, comprehensive and easy to use thus they have been met with high customer satisfaction.
More than a contact manager, Legrand provides the functions and modules needed to grow and manage your customer base, many of these are not found in our competitor's packages, such as.
Campaigns module - track, mange and review your marketing success.
Customer Service module - manage client issues or project through to completion.
Item tracking module - track what clients have purchased from you previously, all the info you need to run targeted marketing campaigns, a repeat sale to an existing client is easier than acquiring a new client.

Together Legrand CRM, Legrand Accounting Link, and QuickBooks allow McWilliams & Associates to:

- *Increase results 50 percent to 70 percent with targeted marketing campaigns based on customer purchases and activity*
- *Decrease owner's time on administrative tasks by 6 to 8 hours each month*
- *Reduce staff's data entry time and time spent playing phone tag by 3 to 5 hours each month*
- *Avoid double entry of customer information in two systems*

Click here to read more.

http://www.legrandcrm.com/PDF/Legrand_McWilliams_SuccessStory.pdf

QuickBooks Integration:

Key financial information about the account status of your customers is available within Legrand CRM's consolidated information center. Your sales people and account managers can view a customer's outstanding balances, contact information, credit limit and accounting notes – allowing your team to operate more efficiently.
In addition to importing/exporting address & contact details and financial summaries, the optional QuickBooks link also provides 'live' access to the invoicing information in your accounting database.

Installation & Setup:

This depends greatly on the number of users and the data source that needs to be converted.
The application itself can be installed on a PC in 20mins.

For 5 user install for a QuickBooks client with no existing CRM database the system is straight forward to install and the import of data from QuickBooks and perhaps outlook is seamless.
Thus one to two days would be plenty.

Demonstrations & Trials

Legrand has 10 brief self running flash video clips online to which you can watch at your leisure http://www.legrandcrm.com/onlineVideos.htm.
One to one live demos are available at request; please contact us on info@legrandcrm.com to request a demo.

A fully functional trail version can be downloaded from our website; this trial will last for 30 days, and allows 2 user concurrent accesses.
http://www.legrandcrm.com/reg.aspx?regionName=USA

Pricing, Support, Enhancements & Updates:

Legrand CRM is available in 3 editions STD ($225 per user), PRO ($350) and CORP ($450)
Legrand CRM comes with 30 days free phone support, free email support for the life of product while 95% of our user base uses the free email support, support pack are also available in per incident packs ($100 per incident).

Software Maintenance (SWM) entitles users to all updates and version upgrades for the 12 months of coverage i.e. we will be releasing v5 in summer of this year, users with SWM you will not be required to pay for an upgrade. Major releases are done yearly.

How can [product] help Advisors with their clients?

Legrand Provides a solution that meets your clients' needs & delivers high satisfaction

- Legrand CRM delivers immediate benefits.
- For a small investment your Customer will see an immediate return:
    - more incremental sales to existing clients
    - higher customer satisfaction due to better service response

This allows your practice becomes a full solution provider

- In recommending an easy-to-use CRM system you have taken your relationship with your client beyond accounting to a more value-added relationship
- More consulting revenue: recommend processes and procedures for extracting maximum benefit from Legrand CRM; recommend marketing campaigns, etc…

Closing – What is the most important point you would like to make?

In today's client focus marketed, companies wishing to maintain an edge must understand and communicate with its customer base across multiple channels; this will mean the difference between managing customer reactivity and managing customers proactively.

Simply stated, if you know which customers are most valuable to your business and can record and track that information, you can anticipate their needs and leverage that information across marketing, sales and customer service.

Technology is one core component. Customer insight, no matter how rich, cannot be fully leveraged without the technology to enable the relationship.

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