



**Flightdeck** provides highly effective Client Relationship Management for **Accountants...**

- Improve team working and communication
- Gain tighter control of your business
- Manage time and fees effortlessly
- Increase client loyalty

# What is CRM?

Client Relationship Management is about managing relationships with clients and others with a view to ensuring these relationships are as mutually beneficial as possible.

Flightdeck believe that the four most important benefits of **CRM** are:

## **Client satisfaction and loyalty is increased**

Given that it typically costs around 8 times as much to recruit a new client as it does to service an existing client, the importance of retaining as many clients as possible is paramount.

## **Internal communication and teamworking are greatly improved**

Your team work effectively in a streamlined and coordinated way and be fully armed with all the information they need. Clients and potential clients perceive a helpful, friendly, efficient and professional organisation.

## **A CRM system should bring together all information related to your clients and what you do for them, and manage it effectively.**

Client facing employees in all areas of the business are then able to make quick and informed business decisions.

## **CRM is NOT Software**

CRM is a business strategy designed to reduce costs and increase profitability by improving client loyalty.

## **Effortless time and fees facility**

Flightdeck allows you to record time against a client, activity, task or a job giving you complete flexibility over your time recording. Recoveries can be calculated with ease and without having to make time consuming manual alterations.

## **Senior management have the tools to be fully in control of a business**

Enjoy full awareness of everything considered important about what's going on in the business. Be automatically alerted to anything that happens which you want to know about and have a 360 degree view of your practice and its clients.



# What is Flightdeck?

Flightdeck is a powerful **CRM** system which enables you to keep track of all that goes on in your organisation, putting you in complete control.

It brings together all relevant information from across your business - such as what you do for your clients, how you market and sell to them, how you provide service or customer support, what contracts you have in place with them, financial information and so on.

This can have a huge impact on revenue, client loyalty, internal communication, operational costs, business reputation and, of course, **profitability**.



Flightdeck will allow multiple users to share information so they can work effectively in a streamlined and coordinated way. The team will be fully armed with all the information they need in the right place at the right time and they have total control over how the information is presented.

As your products and services evolve over time, Flightdeck will follow. It allows you to change and create new forms, views and analysis as frequently as you like thus ensuring that your CRM system is always as up to date and fresh as the business you are **developing**.

# Why is Flightdeck Different?

Flightdeck is a highly configurable **CRM** solution

## 1. Very Configurable

At the heart of our solutions we use our Flightdeck software which is configurable at a fundamental level. It can be moulded and crafted around any number of differing requirements but at extremely low cost. We are able to offer the advantages of a bespoke solution built entirely around your specific requirements but at similar cost and timescale to buying shrink-wrapped software.

## 2. Real Partnerships

We partner with you to deliver Flightdeck in a service based way which is focussed on your business needs rather than as a software installation. We work with you into the future to ensure you are able to use the system effectively and to ensure that the system adapts and changes as your own business requirements change.

## 3. Futureproof

Your requirements will certainly change over time, your business will expand or your processes will change, and your information system needs to support these changing requirements. Having extremely flexible software at the heart of your information systems and a partnership with your software supplier is crucial to this.



# The Flightdeck Process

## Exploratory meeting

Initially, we would have one or more exploratory meetings to determine broadly how Flightdeck might be implemented in your practice. At these meetings we obtain a basic understanding of how your practice operates and what it is that you need. We examine where you are, where you want to get to, what you see as the issues getting there and what your information requirements are likely to be on that journey.

**We know that Flightdeck is not going to be the most appropriate solution for every business and we will tell you if we don't think Flightdeck is right for you.**

If we all agree that Flightdeck would be appropriate, we are then able to provide you with a broad estimate, in the form of an Outline Proposal, based on these initial meetings.

## Workshop

Assuming the Outline Proposal is acceptable, we would then continue with the first day of the implementation in the form of a Flightdeck Workshop. During the workshop, we would achieve the following things:-

- *Gain understanding of the relevant business processes in more detail*
- *Document details of data requirements*
- *Understand workflow requirements and who needs to see what and so forth*
- *Agree printed output required*
- *Uncover other elements that could be automated (optionally)*
- *Discuss and agree project elements – roles, timescales, phasing etc*
- *Discuss and agree training requirements*
- *Understand existing data sources and data migration requirements*
- *Establish any requirements to interface with other systems*
- *Document in detail what the project deliverables will be*

Following the workshop, a full proposal would be prepared and submitted showing a fixed total investment required. Typically, the investment required would be approximately as estimated depending upon some of the variable factors such as training, data migration and so on.

Most customers take the view that this way of proceeding with the initial day of implementation provides reassurance that we really do understand their business and it allows them to see clearly how Flightdeck is going to work in their business before committing to the project.

## Implementation

Usually, and hopefully, you would then decide to proceed with the remainder of the implementation of Flightdeck based on the full proposal, **although there is no obligation to do so.**



# Nabarro Poole Case Study



## Company Profile

Nabarro Poole is a practice of chartered and management accountants with offices in Manchester and Oswestry. Their clients operate throughout the UK and undertake both commercial and industrial activity.

They offer an extensive range of services including accounting, tax and payroll assistance, dealing with change, setting up new companies, helping businesses expand and when difficulties arise.

## Challenge

Time recording software was used to process and store work in progress information alongside basic client details, the combination of which allowed invoices to be raised. "There were some flaws - it gave different results on different reports from the same data" said Alan Poole, Director of the company, "For a long time this wasn't really an issue though because overall the software did the job and it was easy to use and understand".

Alan was content with his time and fees system but in 2004 he realised that with the business growing and changing, he needed improved systems to be able to monitor work, measure and act on customer feedback and use in house information to generate yet more work.

Alan required a solution for managing his customer relationships and to track and record everything important that was going on within the business. His existing system could provide an integrated accounts solution but seemed relatively expensive and didn't offer wider data handling prospects. Alan needed a CRM system that could integrate with the other systems they were using. They have various tax, time recording and accounts systems so the last thing they needed was another system to have to enter data into.

## Why Flightdeck?

Nabarro Poole went to significant effort to research the right CRM package. They looked at basic contact management right through to some of the big budget systems.

Nabarro Poole were not looking for a "one-size-fits-all" package, "Flightdeck was the perfect balance for us; a fully integrated system at an affordable price. In the end it was the obvious solution".

Alan liked Flightdeck because it would replace some of their legacy systems and work well alongside their other programs. Flightdeck would also eliminate repetitive double entry and help reduce human error.

“We wanted more than just contact management” said Alan. “With Flightdeck we are able to relate organisations, put budgets in, plan out a project, work out pricing and profitability, look at where we can make improvements within the business, measure Key Performance Indicators (KPI’s), distinguish between clients and non clients. We can track literally anything and everything”.

“Flightdeck’s huge advantage is that you can expand it to almost anything you want. If you want to do something a bit different, try Flightdeck.”

## Results

In the past invoicing has not always been straightforward. Flightdeck has turned this around so that in some cases they are able to create an invoice in less than a minute.

“Invoicing is now a joy and it’s always quick and accurate. We are able to price better as we know exactly how much things have cost us and the data is easy to read and organise. Flightdeck is easy to use and it’s effortless to transfer time around between jobs, to enter data and to see where you could make improvements.

“People don’t change things if there will be only marginal benefit, they change things because there will be some significant benefit, and that is what we have found. As a by product of replacing our time and fees system with Flightdeck, we have all of this opportunity. We have all of this extra information without actually having to do anymore work; it’s completely free in terms of effort”.

“With Flightdeck, the time and fees system is excellent, the CRM system is even better, plus it’s an all in one package. Accountants, Solicitors and some other professional practices generally have a time and fees system already. Why not replace it with Flightdeck and have CRM too”?

“Anybody who charges by time or wants to monitor its cost could benefit from Flightdeck. Why not do yourself a favour and have a look”





Darwin Court Oxon Business Park Shrewsbury SY3 5AL

**0800 652 73 73** [info@flightdeckcrm.co.uk](mailto:info@flightdeckcrm.co.uk) [www.flightdeckcrm.co.uk](http://www.flightdeckcrm.co.uk)