

Tracking Your Fasteners

by:

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What is CRM? Do You Need It?

Customer Relationship Management (CRM) is sometimes used to define database marketing. This approach emphasizes the promotional aspects of marketing linked to external (noncustomer) databases. A better definition is to consider CRM as a tool to help develop and expand relationships with interested prospects and customers.

Why Use CRM?

A major goal of most CRM systems is to develop an integrated system to identify, maintain and build up a network with individual customers, and to continuously strengthen the network for the mutual benefit of both sides. The idea is to provide all the needed information to all the interested parties in real-time based on information gathered at all points in the relationship.

CRM as Shelfware

One consistent problem with implementing CRM systems is gaining user participation. Firms purchase the latest CRM software with all the bells and whistles, put it on the shelf and no one ever implements it. Worse yet is the implementation where some people use it and others are just too busy. In that scenario, the company has the illusion that they are managing their customers and their information wisely, but there are huge gaps in what they know. Salespeople, who are a critical component of the information gathering phase, are infamous for not liking “paperwork”. CRM definitely is “paperwork”, even if the entry is put in on a smartphone or tablet.

The BUSINESS EDGE 2.0 CRM LITE™

In our ERP (Enterprise Resource Planning) system we have included many aspects of a CRM system, but rather than make it broad, we made it deep. Information can be easily exported to an off-the-shelf CRM system for marketing purposes. However, once the prospect becomes a customer, the system not only manages customer relationships, but it has places for detailed notes and follow-ups by sales order, invoice, product, lost sale, etc. In addition to these specialized notes, it also includes vendor, purchase order and salespeople relationships.

Information Gathering is Right at Hand

Since users of The BUSINESS EDGE 2.0 software system are already entering orders, purchase orders, etc., the “CRM” information can be easily entered while these users are doing their normal work. With this capability, it becomes more convenient to enter the information than to avoid entering it. The result of this is that the CRM Lite in The BUSINESS EDGE 2.0 doesn’t become shelfware. Instead, it gets used.

Customer Notes with Follow-Up

With this aspect of The BUSINESS EDGE 2.0, the system maintains complete detailed information about all aspects of the customer relationship.

ENTER & EDIT CUSTOMER NOTES					
Customer		1000 AA Manufacturing Co. (Notes 06-20-12)			
Phone Number		(773) 547-9854			
Date	Time	Notes	Follow-up Date	Follow-up Time	
06-20-12	11:50:13	This customer is the boss's brother-in-law. Be nice.	06-28-12	12:00:00	
03-06-12	13:31:55	This is a new note.	03-14-12	12:00:00	
11-02-11	10:39:46	This is a new note	11-15-11	12:00:00	
09-20-11	09:03:55	This is the first time he actually thanked us for doing som...	09-21-11	12:00:00	
06-29-11	20:18:54	Hi.			
04-05-11	08:40:38	This customer is very important. The guy is Verne's Broth...	04-20-11	12:00:00	
11-16-10	14:01:54	This is a note	11-23-10	12:00:00	
10-26-10	14:47:39	We applied the check to the wrong invoice. We promised ...			
08-24-10	14:00:57	Pop up notes are better than pop tarts.	08-25-10	12:00:00	
07-20-10	13:02:52	Bob promised a check again. Don't sell until it comes.			
05-21-10	11:59:49	They cleaned up all their past dues!!! It's about time.	05-27-10	12:00:00	
01-30-10	09:48:37	Government Money, things have been much better			
11-29-09	09:11:15	This customer has been with us since 2000. Please treat ...			
05-05-09	07:52:28	This is a Customer Note	03-26-10	01:00:00	
04-28-09	11:28:34	They overpaid, but they said to keep it until the next invol...			
04-03-09	11:29:39	This is an exciting note!			
03-02-09	08:18:35	Today is the day that they are supposed to place their or...			
02-05-08	09:31:36	Check is in the mail.	03-07-08	10:00:00	
02-04-08	08:21:39	When will we see the check	02-18-08	08:22:08	

CUSTOMER NOTES WITH FOLLOW-UP

ENTER & EDIT CONTACT INFORMATION						
Customer		1000 AA Manufacturing Co. (Notes 06-20-12)				
Customer Phone		(773) 547-9854				
Customer Fax Number		(773) 547-9855				
Contact Name	Title	Phone	ext	E-mail	Instant Message	Fax Number
Billy Owner	President	(773) 547-8547	102	billy@aaamanufacturing.com		
Bob Fredricks	VP	(773) 547-8547		bcowhey@ci-inc.com		
Dennis R. Cowhey	CEO			dcowhey@ci-inc.com		
Howard Tinney	CEO			howard.tinney@hamfast...		
Thomas Blender	VP	(773) 547-9678		tcowhey@ci-inc.com		
Wayne Beatty	VP			wbeatty@aaamanufacturin...		

UNLIMITED NUMBER OF CONTACTS PER CUSTOMER

ENTER & EDIT CONTACT INFORMATION	
Customer	1000 AA Manufacturing Co. (Notes 06-20-12)
Customer Phone	(773) 547-9854
Customer Fax Number	(773) 547-9855
Contact Name	Bob Fredricks
Title	VP
Phone Number	(773) 547-8547
Extension	
Phone Number 2	
Extension 2	
Fax Number	
Cell Phone Number	
E-mail	bob@aaamanufacturing.com
Instant Message Name	bobaim
E-Mail Copy of Invoice	No
Comments	

DETAILED CONTACT INFORMATION

Unlimited Number of Contacts Per Customer

Large customers have many different points of contact. All contacts are kept in one easily accessible place. E-mails can be sent directly from the contact inquiry screen.

Detailed Contact Information

Detailed contact information is easily entered/edited in the CRM Enter & Edit Contact Information screen.

Lost Sales Information

Lost sales information is collected by the system and systematically reported.

Vendor Notes

Detailed vendor notes are easily entered and edited in the CRM Enter & Edit Vendor Notes screen.

Specific Notes for Each Purchase Order or Sales Order

Expediting notes or other important information that relate to specific documents can be entered on each document itself, eliminating the need to search through files.

Product-Specific Notes

Product instructions, warnings and explanations are easily included.

Document Management

In-bound faxes, scanned documents, PDFs, etc., can be easily attached to customer, vendor, salespersons, product, PO, sales orders, products, lot tracking records, etc. Having all of this information available saves time, eliminates errors and improves the overall performance of the company.

Everything at the User's Fingertips

The tight integration of the system and the ease of adding the information, means that everyone has all the information that they need when they need it. Since they enter the information without leaving the processes that they must do anyway, the information actually does get entered.

Do It Right

Whatever you do, if you decide to implement CRM in any of its forms, take the time to train your people on how to use it and why it is important to the company. Management leadership is extremely important for this implementation,

LOST SALES INFORMATION

Product Code CB0.187-24X0.750
 Internal Description 3/16-24 X 3/4 CARRIAGE BOLT PLAIN STEEL

Date	Customer	User	Comment
12-08-0...	1031 Whiting Turner	DEMO2	Out of stock
12-08-0...	1040 Cal Fasteners, Inc.	DEMO2	Out of stock
12-08-0...	1021 Bob's Fasteners	DEMO2	Out of stock
12-09-0...	1000 AA Manufacturing Co.	DEMO2	
12-09-0...	1000 AA Manufacturing Co.	DEMO2	
03-08-0...	1033 California Systems	DEMO2	too high
05-22-0...	1000 AA Manufacturing Co.	ROOT	
10-23-0...	1033 California Systems	DENNY	
11-13-0...	1157 Goss International Corp.	DEMO1	
03-30-0...	1000 AA Manufacturing Co.	ROOT	
08-19-0...	1149 Berger Iron Works, Inc.	DENNY	
09-09-0...	1201 Endries International	DENNY	
09-28-1...	1011 AAA Company	BRIAN	Pending Order
10-04-1...	407368 KJL Fasteners	BRIAN	

LOST SALES INFORMATION

ENTER & EDIT VENDOR NOTES

Vendor 191 Brighton-Best International, Inc. (Notes 01-24-11)
 Phone Number (562) 808-8000

Created By Denny Cowhey 01-24-11 13:47:13

Notes

Tahoma

They made the delivery just when we needed it!

Pop-Up Alert? No

Follow Up Date 09/27/2012

Follow Up Time 09:00:00

VENDOR NOTES

ENTER & EDIT PURCHASE ORDER NOTES

P.O. 14484
 Vendor M-139 Danaher

Date	Time	Notes	Follow-up Date	Follow-up Time
09-06-12	16:19:05	Delivery promised in 14 days	09-19-12	09:00:00

SPECIFIC NOTES FOR EACH PURCHASE ORDER OR SALES ORDER

ENTER & EDIT PRODUCT NOTES

Product Code 12N100TSWAB
 Internal Description #12 X 1 Self Tap Slot Hex Wash Type AB

Product Entered By DEMO1 06-12-07 09:09:16

Date	Time	Notes	Follow-up Date	Follow-up Time
09-06-12	16:15:33	This is not to be used with material less than 1 1/2" thick.		

PRODUCT-SPECIFIC NOTES

since many employees will see it as a "hassle" and won't see the benefit unless it is clearly pointed out to them. To learn more, visit www.ci-inc.com

Dennis, R. Cowhey, CEO – Started **Computer Insights** in 1981. He served for many years on the **Illinois CPA Society Computer Information Systems Committee**. He is a frequent author of articles for industry trade magazines. Before starting Computer Insights, he served as Central District Manager for a division of **Litton Industries** (now part of **Rockwell**), that offered inven-

tory control systems to retailers. Prior to that, he was a Credit and Financial Analyst for National Credit Office division of **Dun & Bradstreet, Inc.** Cowhey received his education at **Chicago City College** and **DePaul University**. Computer Insights provides the fastener industry with The **BUSINESS EDGE 2.0** software for efficient tracking of fasteners.