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**Business Technology Solutions** Fri, Jun 15, 2007

### Entellium's RAVE CRM

 In April, I shared with you the breaking news of

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Entellium's unveiling of its Rave CRM with a promise I would review the product upon its actual release. Rave was indeed released a few days ago, after a short delay to work out last minute bugs, and I have spent that time putting the product through its paces and interviewing Entellium execs to get the inside scoop.

In a nutshell, Rave is an advanced contact management program as opposed to a full-spread CRM program with sales metrics, financial data, business processes and automated inventory management.

Rave therefore has limitations in its ability to combine and mine data. But that's not necessarily a draw back, especially for beginners and for individual entrepreneurs who, generally speaking, know exactly what checks they are expecting in today's mail and therefore don't have much of a need for real-time profit and loss statements.

Rave is well-suited for small businesses with one to 100 employees. It is easy to use and tracks all contacts made with current and prospective customers. Originally hyped as "designed with many of the elements found in today's best-selling video games," the actual product is incredibly simple to learn and use with its "click, drag, and drop" set-up although beyond that, it isn't much like a game.

With Rave, if I wanted to make a note that I called my editor at this magazine I don't have to sit here and type "called my editor at this magazine and discussed a story on XYZ wireless widgets." Instead, I can click on the phone icon (either the outgoing or incoming to note whether I made the call or received it) and drag it to the notes section on my editor's contact page, which will then fill in the basic facts: I called on this date at this time and then I can quickly type what the call was about and her reaction. I can also trigger a reminder to get back to her on a certain date and even attach a copy of the proposal or story I wrote in MS Word. If I choose, I can email the entire thing, or any part thereof, to my agent or my assistant... either now or at a later date.

In much the same way, a hair salon's employees could note customer likes and dislikes, hair anomalies and allergies, product preferences, appointment time preferences, and other data about clients so that the receptionist and hair dresser can always refresh his or her memory prior to seeing the customer to more personalize the experience, and so the salon would know what products to show the customer and even which sales flyers or coupons are most likely to entice her to either return to the salon or to buy more product when she arrives.

A banker can pull up a customer's page and see previous activity with the bank, plus pull up RSS feeds to see the latest news on the customer while he is on the phone to aid the conversation. "Congratulations Mr. Smith on your recent addition of a store in Topeka!" is a great way to connect with the customer. Since banks are highly regulated, there is little to distinguish their services and develop their brand. Being able to show personal interest in a customer therefore becomes vital to increasing revenue. The RSS crawl of news specific to any given customer is a great cheat sheet to help pull this off.

In a typical Mom and Pop business, Mom can visit relatives out of state and Pop can still find all the customer records and a service/sales calendar without searching the kitchen for the file or the table top for a collection of hastily scribbled notes.

Rave's contact list has a star rating system so you can rate customers on how much they spend with you and prospects based on how much they are likely to spend with you; an activity set that allows you to build your work flow around your customer's preferences and needs; a personalized email system for mass emails; customizable documents which you can use to make a checklist for your sales or service people or design your own quote forms; a document automater that can make any document you create from scratch into a template for future similar needs; and, a desktop application that allows you to work on and off line. All drop downs are customizable and advanced features are hidden. This keeps beginners from being overwhelmed but easily allows advanced users to do more with the software.

Since Rave is built on MS Outlook, it is integrated in real time and the tools are familiar to most people. If you do run into problems, there is a 24/7 Live Chat feature for technical help.

As to Entellium's future plans for this product: "Eventually there will be a VoIP connection so that you can dial and receive calls directly through the Rave system," Samuel Sunderaraj, business development manager at Entellium told me. "We are also planning on launching Rave Mobile in January or February 2008."

According to Sunderaraj, Rave costs \$400 per user per year (roughly \$34 a month). There is a multi-year price break; for example, if you sign a contract for two years the second year is at 50% less than the first (\$200).

You can try Rave free for 30 days at <http://www.ravecrm.com/?skiplntro=true> .

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Business Technology Solutions

Fri, Jun 8, 2007

### Can't Afford CRM? Look to Your Trade Association for Help.



There has been an overwhelming response to a blog entry I did earlier on automated CRM. It seems few readers realized that the market is surging into an automated world where small businesses are likely to be erased from the map if they don't have machine-to-machine selling and service capabilities, a function that begins and ends with CRM.

Because this news came as such a shock to so many, I thought I would throw a little more light on the subject in the hopes of helping you find your way.

In the earlier blog entry, I referred mostly to home appliance repair businesses, the Mom-and-Pop operations servicing washing machines, heating & air, refrigerators and the like. I pointed out that first one had to make the list with each manufacturer so that the affected machine would summon your shop versus a competitor's. I also said that without CRM, i.e. the ability for machine to talk to machine, making the manufacturer's list was a moot point.

Today, I want to illustrate that the impact of automated sales will be felt far beyond the appliance repair industry. I want you to understand that the market has already moved and you must either move with it, or get left behind.

This is a thought shared by several savvy industry associations like the Lawn and Garden Dealers Association (LGDA) which recently entered a partnership with Intelligentz to save its 2500 members from the coming automated crunch.

LGDA was founded in 1986 when the founders recognized that small lawn and garden stores, for the most part, did not take credit cards. This was mainly due to

the extremely high charges these small companies had to pay to have this service. Most felt it simply wasn't worth it and soon lost business to major chains that did accept the increasingly popular credit cards. LGDA began offering credit card processing at extremely competitive rates and the response was extraordinary, making small lawn and garden stores competitive once again.

Under the newly forged agreement, members will receive Intelligentz's Pangaea software at a preferred rate. Members will not only gain greater online visibility to enhance their product's search ability, but also reduce unnecessary inventory, rapidly process orders, generate revenue outside local markets and otherwise compete in today's fast-paced market place.

"Our members indicated a need to have a low cost alternative for both parts searches and POS (point of sale) software as well as the ability to be on the forefront of technology without the 'bleeding edge' costs that so often occur with software installation," said Kirk K. Nellis, President and CEO of LGDA in a prepared statement.

Intelligentz and LGDA are working together to provide a web centric storefront, which will be featured within Parts.com, an Intelligentz Automotive Corporation owned site. Parts.com has more than eleven million page views monthly from more than 1.4 million unique users and is the #1 automotive parts ecommerce site on the internet. Users will be able to search and secure products ranging from lawn and garden parts and supplies to machinery. Also, as more and more users become mobile savvy, searching for parts on mobile browsers (cell phones, PDAs, and laptops) will become second nature. Intelligentz's mobile applications can easily transition companies to getting their inventory online so that it can be easily accessed with a mobile browser.

By providing a web centric interface for retailers, they can visually see their entire inventory at once. They can also determine demographic market trends through a report feature that provides LGDA members with search statistics for each product. This will allow them to prevent out-of-stocks and reduce those inventory items which are not selling. Tracking and tracing the inventory will also provide a much easier purchasing process by getting the products to the customer at a faster pace.

In addition, with no upfront software costs and a low monthly fee, this allows the dealer to have the same POS software as the larger retail chains, including inventory management, remote access visibility, customer relations management (CRM), and accounting functions.

"Even though there are giant stores carrying every product imaginable, consumers

still appreciate their neighborhood retailer for its personal customer service that is so hard to find," said Michael T. Lucas, President and CEO of Intelligentz. With the collaborative efforts of both Intelligentz's Pangaea Software and LGDA, members will have a greater buying power to compete with nationally recognized home improvement centers.

If you can't absorb the costs of CRM alone, look to your industry's association or to professional groups for help. If they aren't already moving in that direction, it's past time to give them a push.

Learn more about Pam Baker:

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Business Technology Solutions

Tue, Jun 5, 2007

### Google and Salesforce.com Team Up to Woo Small Business



In a dramatic turn of events, Google and Salesforce.com finally exposed the nature of their newly formed partnership. Many were anxiously awaiting word on the inevitable product announcement -- rumored to be some sort of "Microsoft" killer-- but few were prepared for the actual news. This week's announcement revealed the two companies jointly developed Salesforce Group Edition for Google AdWords, designed specifically for small businesses. SMBs can use this product to track their Google advertising spend (online advertising) all the way through to leads, prospects and sales metrics in Salesforce.com's CRM application.

By targeting the small business market, the new product brings Google new advertisers and gains the company a toehold in its transition from a purely consumer service to a consumer / business mixed-use service. Once firmly in the door, Google

hopes to woo larger businesses into its fold as well. That is not to say Google is likely to lose interest in whatever SMB base it builds; the overall market is heavily depending on SMBs to gain and hold market share and profits these days.

Meanwhile, Salesforce.com gets more marketing punch, a stunning competitive edge, and a bucket-full of new features including dashboards that uncover actual key word and marketing campaign performance; the ability to create contextual links into Google maps; and, an easy way to use lead forms on your company website that automatically feeds the data into the CRM. Last, but not least, the product makes it easy to buy and refine key words from Google, build ads that conform to Google requirements, and track performance from ad launch to counting bank deposits in fine detail. Users can also share documents and spreadsheets through Google applications.

The more savvy small businesses were already advertising on Google, buying key words (Google calls them AdWords) for search engine optimization (SEO), and even adopting Google's online word processing and spreadsheet and email applications (even though they were not ditching their Microsoft Office altogether). It was this swarm towards Google's office apps that had so many people thinking the Salesforce.com and Google alliance would produce a Microsoft-killer product. Those hopes were dashed with today's (June 5) announcement. That's unfortunate because it eclipses the true value of this product to small businesses.

The ability to create and manage online sales and advertising, plus manage your existing customers and campaigns, and organize your business functions in one product is simply HUGE. The advantages to small businesses cannot be overstated.

For the first time ever, companies like Google, Salesforce.com, and others are making tools available to small businesses that actually open the door of opportunity to a market segment too long ignored. Expect to see other competitive products hit the market very soon. All of it will be good news to the hard-working entrepreneur who desperately needs to spend more time generating money than pouring over admin work and segmented, often out-dated company data.

For now, SalesForce Group Edition for Google AdWords is a darn good start. Salesforce Group Edition featuring Google AdWords is available today in a five user edition for a special, 30 day promotional price of \$600 per year, including a \$50 AdWords credit. The \$50 AdWords promotional credit is available to new AdWords advertisers in the US, Canada, and Mexico only. The list price of the solution is \$1,200 per year. AppExchange applications may require an additional fee. For more information, visit <https://www.salesforce.com/google> or call 1-800-NO-SOFTWARE.

[Learn more about Pam Baker.](#)

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Business Technology Solutions

Fri, May 25, 2007

### What Can Avon Teach Us About CRM?



I discovered a new twist on CRM applications yesterday. Essentially, Avon's calling using my daughter's local number, so to speak. Avon, a Fortune 500 company, has managed to remain up-close and personal with its customers by enabling individual sales reps, like my daughter Stephanie, to create their very own web store within Avon's corporate CRM system. (Stephanie's web store can be found at <http://www.youravon.com/sbaker5583> if you want to see what I'm talking about. )

Avon reps are independent contractors, essentially small businesses in and unto themselves. Avon's CRM system provides the means for the reps to use CRM without having to absorb the costs and maintenance problems. I also suspect that it enables Avon corporate to maintain customer information even if a rep quits. I have no problem with that; in fact, I find the whole idea ingenious!

This means that Avon customers are not confronted with yet another faceless behemoth corporation online, manned by foreigners somewhere in a call center in Asia, nor are their products shipped by hundreds of unknown minions locked away in a mega-warehouse somewhere. Instead, local customers are directly interacting online with their local sales rep, in this case my daughter Stephanie.

"We spent the past 120 years developing one-on-one relationships with women," Amy Miller, spokesperson for Avon, told me when I called her about the system. "We wanted our customers to still have that personal service... plus the convenience of ordering online. Avon developed the system (a blend of proprietary and branded

CRM applications) to keep that warm and fuzzy feeling, and not just leave our customers, our friends, to deal with cold, indifferent computers.”

Stephanie’s customers have lots of options: they can shop, order and pay online and have their orders shipped directly to them, or Stephanie can take them samples, collect their order and payment in person and personally deliver the order when it comes in, or any combination thereof. It all boils down to the customer’s preference. How cool is that!

On the other side of the order form, Stephanie, who is in college and selling Avon products to help cover her expenses, has a valuable CRM aid to boost her sales. Among the features she most adores are:

- 1) Customers and Groups which allows sales reps to add/edit customers and group them by the products they use, their age range, etc.
- 2) Recent Order Activity which shows who ordered what and when recently.
- 3) Customer Invoicing Tool which allows the rep to invoice online.
- 4) View customer history which allows the rep to search by customer or product and to email customers on promotions customers are likely to want (based on their previous buying history).
- 5) Other Invoicing Features allow reps to view items on backorder or add/edit customer discounts
- 6) Email Campaigns allows the rep to send offers to customers from the online store
- 7) Events and To Dos organize rep activities
- 8) Auto responder sends customized automatic response to customers/ potential customers who send a message via the "contact me" link
- 9) Personal Beauty Manager is a separate CRM option that records and organizes each customers orders so the customer can be reminded to reorder products.

I would think a similar CRM set-up would be very advantageous to small businesses using independent sales reps throughout the country and to franchises who want to save costs by piggy-backing on the corporate parent’s system. There are tons of ways to use CRM this way. Think about the possibilities!

See you next time!

Learn more about Pam Baker:

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Business Technology Solutions

Thu, May 17, 2007

### Senators Push for Sarbox Extension for Small Businesses



One of the most pressing reasons for small businesses to use technology these days is to stay in compliance with federal regulations. Failure to do so leads to some very hefty fines and long jail stays. Specific rules vary from industry to industry, but compliance is a heavy burden on all businesses, large or small. Small businesses are particularly tasked to produce a running stream of real-time documents from emails to voicemails, accounting ledgers to customer correspondence over a period of many years. This bit of breaking news is sure to be of interest to those of you who are struggling to stay abreast of an ever-tangled tale of federal imposed woes:

With final rules for complying with Sarbanes-Oxley (aka SarBox) internal controls expected in the near future, Chairman John Kerry (D-Mass.) and Ranking Member Olympia J. Snowe (R-Maine) of the Senate Committee on Small Business and Entrepreneurship pressed the Securities and Exchange Commission (SEC) and Public Company Accounting Oversight Board (PCAOB) to provide additional time and assistance for small public companies to comply with the upcoming final rules.

Specifically, Kerry and Snowe asked SEC Chairman Christopher Cox and PCAOB Chairman Mark Olson to allow small non-accelerated filers up to one additional year

to comply with any changes to Section 404 of the Sarbanes-Oxley law. Kerry held a hearing in the Small Business Committee on Sarbanes-Oxley last month where witnesses advocated for the delay and other assistance for small firms. Kerry and Snowe also wrote to the SEC and PCAOB in February during the comment period on the final rules. In the letter to the chairmen, Kerry and Snowe also asked:

- The SEC to fully assess the economic impacts to small companies of the new rules and to publish a small business compliance assistance guide;
- The PCAOB to carefully monitor auditors so that small public companies do not face undue red tape beyond the law's requirement;
- The SEC's Advisory Committee on Smaller Public Companies to report regularly on the law's impact on small firms and how costs can be reduced; and
- The SEC to consider raising the shareholder threshold for securities registration, which hasn't been adjusted for nearly 40 years.

*Source:* U.S. Senate Committee on Small Business and Entrepreneurship

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