CRM & Accounting / ERP

Guide to automated and enhanced processes

In cooperation with

FINAGO PROCOUNTOR

FLASHNODE

Thanks for downloading this guide!

This guide is for you

- CRM-software user
- Sales professional
- Business leader
- Financial management professional

This guide is targeted especially to companies which would like to automate

- Processes of sales and customer service
- Processes of financial management

Content

1. CRM & administration

Characteristics of an efficient CRM-software

Choosing the best CRM solution

Choosing the best financial administration solution

How are CRM and administration related to each other?

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Character of an efficient CRM-software

CRM stands for Customer, Relationship and Management. It is a tool or strategy for organisations to manage their relationships and interactions with customers and potential customers. When people talk about CRM, they are usually referring to a CRM system: a tool that is used for contacts, sales management and productivity.

CRM will help you to find new potential leads, turn those leads into customers and also to keep those customers satisfied. This is all possible when you can view and organise everything in one location: CRM is a simple, customisable dashboard which tells you a customer's previous history, the status of their orders and service issues and challenges. This would mean for example the information about the customer behaviour: that she or he is most likely taking calls in the early morning but likes to be contacted in LinkedIn at other times.

CRM can be integrated with other softwares that are used in the company – for example invoicing, accounting or survey softwares. When everything is transferred smoothly, company will have a 360° view of the customer.

https://www.salesforce.com/eu/learning-centre/crm/what-is-crm/

Choosing the best CRM solution

Nowadays customers are pretty inpatient. They make decisions quick and they have endless amount of information. And when there is a lot of information - as well as options - it's getting challenging to please them in the future.

You might need to ask yourself what kind of CRM solution would be the best for you and how to keep up with the development. You need a CRM solution that is planned to endure and to be scaled within your business.

Here are some of the main questions you need to consider when trying to choose the best CRM system for your business.

- Do you need an on-premise or cloud CRM?
- The system should support your growth and be easy to customise
- Is automating the tasks possible?
- Integrations and interfaces

Want to know more?
Contact us, and we'll have a talk about your situation!
p. +358 50 5732 555
sales@flashnode.com

https://www.salesforce.com/eu/learning-centre/crm/best-crm/

Choosing the best financial administration solution

Electronic financial management enable you to effectively master your company’s financial management, anytime and anywhere. This significantly boosts the efficiency of financial management processes, since manual work phases can be automated.
Many of the the users have been choosing the cloud software because of its flexibility, comprehensively and advanced actions.

Here are a couple of elements of efficient financial management solution:

- Ability to choose a cloud software
- Comprehensive
- Flexibility
- Ability to integrate / Interfaces

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https://finago.com/en/financials/electronic/

How are CRM and administration related to each other?

When you get new customers and orders while using the CRM solution, you still have to do the marking to financial administration and accounting softwares. In the best case you don't have to create orders and invoices manually – the orders and the invoices will be created automatically when the lead is marked as won in CRM software.

There are some benefits you will get straight away after automating:

Saving time

Information is automatically transferred to financial administration software without manual phases. Also sending invoices can be automated.

Updated information

When CRM and financial administration softwares fit together, the data is always updated. The information about an invoice that is paid already, can be transferred back to CRM.

Scales growth

The increasing amount of customers and orders would mean more manual tasks without automation. Automation is taking care of the growing number of transactions without extra acts.

2. CRM and sales processes

Efficient process versus inefficient process

Differencies between manual and automated processes

Tasks and roles of the softwares

Character of an efficient sales process

Efficient sales process is customer oriented and natural part of bigger picture.

With CRM it is easy to take care of the most relevant processes. In certain companies sales process is one of the most important one of all so it makes sense to pay a lot of attention on it.

Typical characters in efficient and inefficient processes:

Efficient Process	Inefficient process
Based on the customer's needs	Defined throughout technical restrictions
Showing every step of the process	Doesn't describe every phase of the process and is unclear
Described in written language and graphs	Is a rough frame not really telling anything about the process itself
Considers the phases before and after process	Thinks the process as closed circuit
Defines acts in every phase of the process	Doesn't consider the customer's needs in the process
Considers the data between softwares	Doesn't take part in transferring the data

Differences between manual and automated work

Integrating softwares causes huge differences to the daily life and business of the company. It diminishes manual work and leads straight to productivity.

Some of the differences are immediately to be seen. Some examples:

Manual	Automated
Customers' information have to be written many times into systems	Integration is transferring information automatically
Information about the orders and products have to be written many times into softwares	Order and product info is transferred automatically
State of the order has to be updated manually into every software	Integration is updating the state of the order automatically
Stock balance has to updated manually	Integration is updating stock balances in realtime
Typos are possible	Automation doesn't make typos
The work that has to be done many times is taking resources	Integration is working on its own
Copy-pasting and transferring data manually is pretty pointless	Automated data transaction is releasing time to more creative work

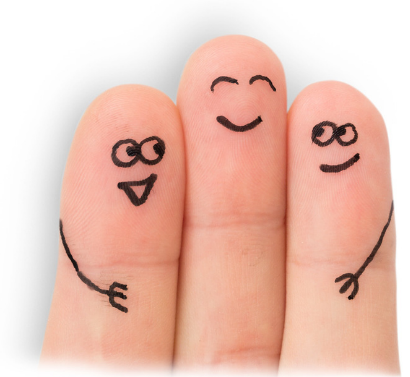
Tasks and roles of softwares

A well defined sales process and clear, unambiguous roles for different softwares are a key for proficient business.

Some of the tasks in sales are better to be taken care of with CRM but some of the tasks needs a financial management software.

Here are some examples of the tasks those softwares can manage:

CRM	Financial administration
Controlling customer data	Invoicing
Customer communication	Sending invoices
Tracking the negotiations	Invoice management
Tracking the orders	Tracking the status' of invoices
Surveys of contentment	Accounting



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3. Best Practices in certain scenarios

When acquiring new CRM

When changing CRM or administration solutions

When the actions between softwares are wanted to be automated

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Best Practices: When acquiring CRM is current

When company is expanding its business, or the customer data or amount of orders are increasing, it is a valid decision to acquire CRM system. CRM companies are offering many kind of solutions - and to find out which is the best for your needs can be challenging. Finding the right software is easier when the process and the needs are defined properly beforehand. Start with drawing your processes and acts - this helps to clear you mind.

Softwares are not always in contact with each other - 'they are not speaking the same language'. This is why it is reasonable to pay attention to integration already before deciding which softwares to acquire.

When acquiring software, it is always suggested to discuss with CRM provider, integration specialist or with your accounting office. This is the best way to map out the best options in your specific case.

[Also check our guide: Choose the app of your favourite flavour]

Or contact us and we'll have a talk about how integration would make your daily life easier!

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Best Practices: When changing CRM or administration softwares

In some cases your old CRM or financial administration solution can partly work even when the demands have grown. Anyhow, most likely the most effective way would be changing the whole software to another.

How do we know when is the right time to change to a new CRM or financial administration solution?

- There has been essential changes or the business has been growing significantly and the software that is used cannot scale within the company
- The old app is no more fulfilling all the needs your company has
- Many softwares are used at the same time - the new software is not able to be integrated within your current CRM or financial administration solutions

The change to another software starts with a proper analysis of the present state and defining which kind of benefits the company is willing to have from the new solutions. Chat with software supplier or integration specialist will help you understand which kind of solution would fit you the best.

Best Practices: When the actions between softwares are wanted to be automated

Maybe the best softwares are already in use and the sales process is defined carefully. In this case increasing the amount of automation in processes and data transactions will only increase the efficiency and the velocity of processes'.

Automating the customer data transactions and order process is sensible ways of attach efficiency. And when the time that has been saved with automation is used for developing the business, the benefit of automation is basically twofold.

The easiest way to start this journey is to have a chat with integration specialist. Flashnode is willing to coordinate this conversation with the other software producers - just to make sure that you will get everything out of your integration.

Read also our guide "Online business metrics"

Or contact us and we'll have a chat!
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4. CRM and financial administration

What is worth to be automated?

The use case examples

Designing, defining and activating the automation

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What is worth to be automated?

When the processes have been defined and softwares are in active use, it's time to think how to make the business and performance even more effective and competent. By analysing the work of the employees in the company, you can recognise some tasks and routines that are frequently repeating themselves. Usually they are also the ones that take a lot of time. These are the exact tasks that are worth automating.

Experience has shown that those tasks (when talking about CRM and financial administration) can be for example transferring the customer and order information, invoicing, invoice tracking and reporting the paid invoices back to CRM.

These tasks can be divided to these two categories:

Customer and order data	Invoicing
Customer and order information moving properly between softwares is urgent for invoicing, delivery and stock balances.	With up-to-date invoicing status it is possible to ensure that only the orders that are paid are being delivered.

The use case examples

Integration and automation have to fit with the processes you are already using. Depending on procedure and process, for example customer orders are able to be transferred to financial administration either before the delivery (to wait for the payment to arrive) or after the delivery (if the payment is not necessary to be completed before delivery).

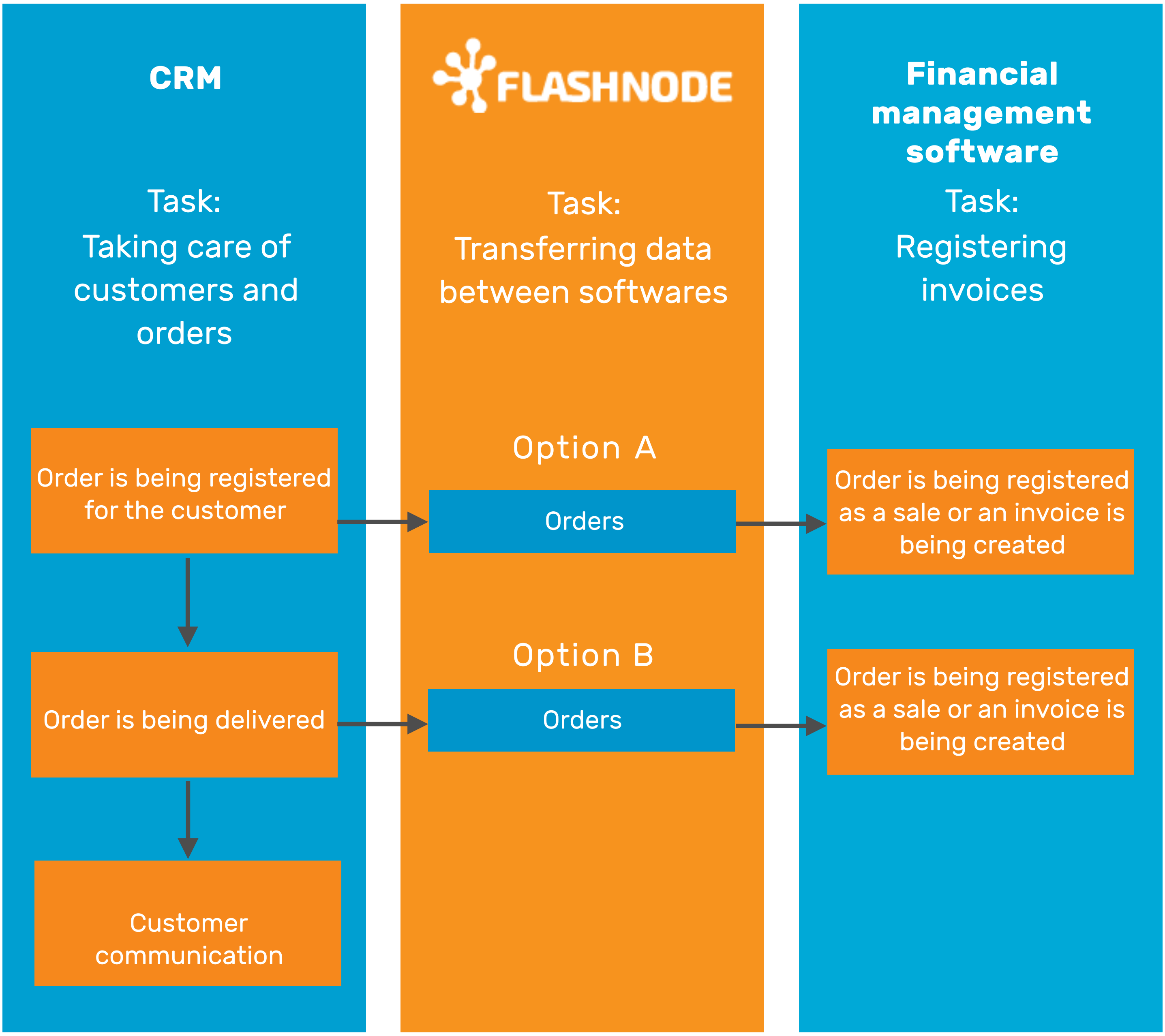
In the next pages we describe two typical procedures: when and how certain information is being processed and how the data can be defined to work between softwares.

For sure other procedures are also available - we can make integrations happen to other services as well - but experience has pointed out that the following examples are really common and the procedures are really working well.

Example number 1

Simple integration: Customer data and order transactions are transferred to financial management software

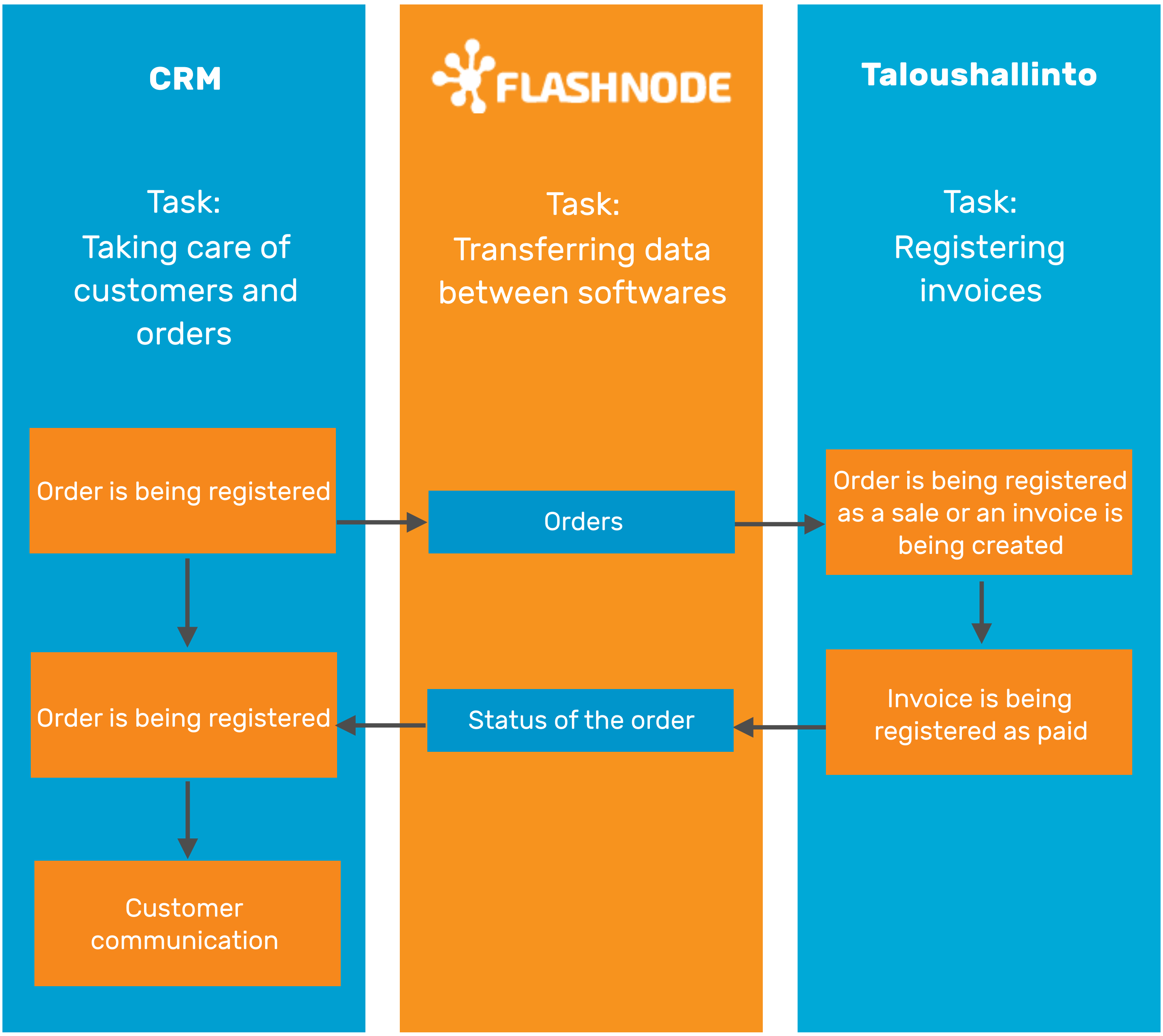
Order information is being sent to financial management software with customer data either straight after the order has been made or after it has been delivered.



Example number 2

Normal integration: Customer data and order transactions are transferred to financial management software + transferring invoice-status to CRM

The information about the order and the customer data will be transferred to financial management software straight after the order has been made. The notification about the paid invoice will be transferred to CRM automatically and the order will be get to delivery.



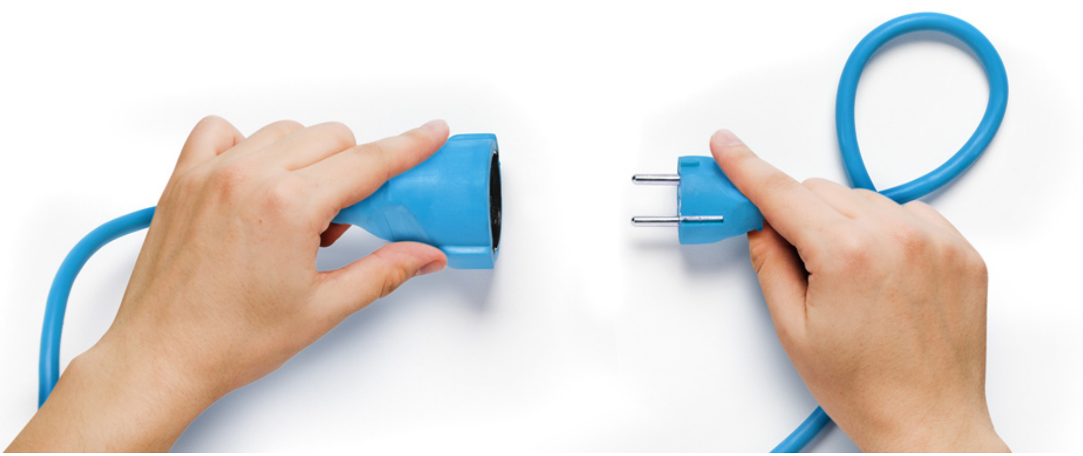
Designing, defining and activating the automation

When activating the integration between CRM and financial management software, it is very crucial that the set up is running smoothly from the first moment. This is why not-well-planned automation will only cause you more problems than benefits.

When the integration is conceived - all the way from defining the needs until qualifying the the data flow - well beforehand, activation will run almost effortless. Activating the set up could be done once and for all or separated in smaller stages in a bigger time frame. The easy 5-steps to a Flashnode's integration is represented later in this guide.

Integration transfers daily thousands of data between the softwares. In the best case you won't even recognise or remember integration running in the background. If for some reason the order, invoicing or customer data is not updated like planned, we have a problem that needs to solved ASAP. If so, it's really urgent to have a proper service for support. This service is included in Flashnode service: with the same price you get full support, monitoring and assistance for in case of emergency. You can entirely focus on growing your business and making your customers pleased - we take care of the technical side.

In the next page you will see how Flashnode works, from the first call to an efficient, complete integration service.



Designing, defining and activating the automation

1. Contact Flashnode or your CRM provider

Don’t hesitate to email or call us, if you are anyhow interested to know more! p. +358 50 5732 555 / sales@flashnode.com

2. Demo / consultation

In consultation we define how integration would make your business more efficient. Together we will qualify the processes that will be automated. After that we will make preliminary technical check and send you the offer that is based on our public pricing list.

3. Analysis

In this phase we will define how the processes are wanted to be automated.

We are also making sure that the integration will work as planned. Together we are agreeing how the Flashnode’s integration set up will look like for you.

4. Activating

We will prepare the set up after our agreement and make sure everything runs smoothly.

5. Support

We ensure that the integration works properly. Also, if you need any help, we are always there for you.

5. Case Study: Nordic Business Forum

How Nordic Business Forum automated their business?

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How Nordic Business Forum automated their business?

Nordic Business Forum (using CRM and Procountor for financial administration) got irritated for manual work. They realized how much time they were wasting for selling tickets, invoicing and tracking status' by hands. This is the story of NBF!

Nordic Business Forum is known as the leader business and leadership seminar in Europe. Every year NBF gathers tens of thousand of business policymakers from all around the world. Only in Helsinki 7,500 leaders are coming together from 40 countries. During the years there has been a lot of 'big names' on the stage, such as Barack Obama, Al Gore, Lindsey Vonn, Arnold Schwarzenegger, Arianna Huffinton, chard Branson, Will Smith and Steve Wozniak. The mission of NBF is to build leaders of the future; people that are changing the world. Their aim is to be the world's most significant business based seminar by the year 2021.

The growth that NBF is aiming, the amount of visitors together with the market sector are setting a lot of pressure for the softwares NBF is using. They chose Procountor as it works properly in Finland but also in Sweden and Norway. Also they wanted to have softwares that are able to scale and enable to use the cloud for home office. These were part of the reasons why they decided for Procountor, Salesforce and WooCommerce as their apps.

> *"We have thousands of customers and invoices. This means it is basically impossible to do data transaction manually - or if it is, it has no sense at all"* says Marjo Hiekkala from Nordic Business Forum.

Earlier NBF was using a lot of time for controlling tickets, invoicing and data transfer. "Automation was increasing our accuracy and effectivity" Hiekkala says.

How Nordic Business Forum automated their business?

When ecommerce works as it should, orders are coming in frequently. Nordic Business Forum knows how essential it is, when the softwares are working together perfectly – especially when the sales are seasonal. For a company which is selling tickets not only in ecommerce but also on the phone and during the seminar, it is very urgent that data is moving between softwares – automatically and on time.

The right solution for Nordic Business Forum was Flashnode's integration service.
Marjo Hiekkala, Financial Specialist, Nordic Business Forum:

> *"Together we defined our processes really precisely. First we were specifying how the softwares are organised and which processes are urgent for us. From that base Flashnode was suggesting options and opportunities. After that, we were discussing together and thought throughout every process. Flashnode helped us in every phase of setting up and activating the automation."*

The strength of Flashnode is especially wide amount of integration services. And when the automation is planned properly, it will also work smoothly.

[Watch the video about Nordic Business Forum case]

6. The producers of this guide

Finago Oy

Flashnode Oy

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Accountor Finago Oy

Accountor Finago provides affordable and easy-to-use electronic financial management. The software is extremely well-suited for joint use by the customer and accounting office.

Most of the small and medium sized companies are outsourcing their financial management to accounting agencies that are Finago's significant partners. Finago offers solutions to efficient financial and payment managements using modern, electronic tools. Procountor and Tikon, services Finago is offering, are easy to use and powerful systems also for professional use.

Over 240 electronic financial management professionals are working in Finago. Business is rising rapidly as electronic financial management has became more common also among small and medium sized companies and accounting agencies.

Accountor Finago is part of SME software business in Accountor corporation. Accountor is offering financial and payment management services and software. Over 2 000 employees and 30 000 customers in 7 countries have chosen Accountor corporation.

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Flashnode Oy

Flashnode is built to help companies all over the world to make their business more efficient with integration services. Service fits to different sized firms in all fields - the only recruitment is that your company wants to make the business work with a maximum power using the benefits of automation and integration.

Flashnode is taking care of its customers from the very first call. Our integration service includes a full support in case of any problems. This ensures that integration is working stable and running also in spontaneous and changing situations.

Flashnode is founded in 2014 and its aim is to be the leader provider of transactional business processes'.

Take a look on Flashnode's integration ecosystem and service:
www.flashnode.com

Or contact us and we'll have a chat about how can we make your business run more smoothly with automation
p. +358 50 5732 555 / sales@flashnode.com