interoffice memorandum

|  |  |
| --- | --- |
| to: | Heather stone, Manager |
| from: | Amy Lancaster, Web Developer |
| subject: | Customer Relationship Management Recommendation |
| date: | November 15th, 2020 |
| CC: | Clarisa George, Founder |

Hi Heather,

Thanks for your message! With regards to collecting e-mails and subscribers, the process is what we call “Customer Relationship Management” – basically, you want a program that will help keep track of all potential, current, and past customers that access your site or come through your door.

I wanted to recommend something that would be easy to set-up and access for you and all your staff after the project is completed. After doing some research, I found that Monday.com would be the best option for you.

Monday.com is a great customer relationship management program that has automation features and a very friendly user interface. You can create workspaces that are designed to your best interests, add your staff as team members, and instant message them anytime. It helps keep track of where potential clients are in the process of conversion, and you can also schedule and assign tasks to specific team members.

With regards to pricing, it does offer a 14-day free trial – this would be a good time for me to acquaint you with it so you can decide if you like it before making a monetary commitment. Pricing after this ranges to $8 - $16 per member per month (up to three staff members can be on the program with these plans). We can also get a customized plan that will give you a personalized quote and allow you to add more staff to the program should you wish.

If you are interested, we can set up a meeting sometime this week where I can show you how it works, and you can decide if you want to implement it. Afterwards, we’ll set up a day for training you and your staff formally on using the program. I really think having this system – or a system similar to it – will greatly benefit your customer relationship management, and it will make it so much easier to keep track on leads, engagement with potential customers, and improve general rapport with customers overall.

Let me know if you have any questions – you can e-mail me, or you have my number as well. Thanks!

* Amy