CRM for SMEs

A CRM system that will help you to be organised and increase sales while providing a better level of customer care.

Clients

Client profiling
Customise client dropdown fields
Client fields you can customise
Number of clients in your database
Client Texting
Client Emailing

Appointments

Schedule future appointments
Record past appointments
Schedule appointments for colleagues
Reminder to clients about appointments
Reminder to staff about appointments
Recurring appointment scheduling
Appointment & Activity tracking
Activity reporting
Outstanding activities on dashboard
Integrated Diary
Bulk assigning of appointments

Sales Marketing

Filter your clients for campaigns
Mailshot by email or SMS
Schedule follow ups
Integration with Mailchimp for tailored emailshots
Set up email signatures for each user
Pipeline Management
Top 50 clients by turnover
Analyse lost business
Conversion rate report
Pipeline calendar report
Flag sales as Invoiced and Paid

Reporting

Client Report generator
Analytics reporting
Staff Activity reporting
Report on Tasks and Activities
Analyse by client type and appointment type
Communication reporting
Report output to Excel
Report output to PDF
Download all reports to excel

User Functionality

Restrict staff to see their own clients only
Restrict staff to see their own diary only
Role permissions
Task & Activity tracking

Communication

SMS facility available
Email individual client
Bulk email clients
Text individual client
Bulk text clients
Schedule automatic reminder to clients for appointment
Communication reporting
Email integration - automatic link with Outlook
Full history of communication with clients

Document Storage

Upload templates and policies
Upload documents for clients
Upload links to dropbox & YouTube etc.

Administration

Full audit trail helping with compliance
Access archived content
Manage your users
Assign role permissions
Import clients

User Permissions

Permission to merge clients
Permission to view Reporting
Permission to view own and colleagues diaries
Permission to bulk edit clients
Permission to view own and colleagues clients

Support

On screen Support
Email Support
Phone Support
Access to instructional videos

Training
Set up training
User Training
Administrator training
Online one to one training
Webinar training
Classroom training
Train the trainer

Data Management
Merge Client facility
Bulk data updater
Pre import cleansing of your data
Initial transfer of your existing data
Data Management work
Fixed Client import facility

Integration
Integration with Microsoft Excel
Output to PDF
Integration with Outlook
Integration with Mailchimp
Output to Hotsoft Hotel software
Links to Google Maps to find clients

Navigation
Quick search from every screen
User dashboard
Tailored for PC, Laptop, Tablet and Smartphone

Invoicing & Payments
Add in Invoices for clients
Bulk assign invoices for courses for example
Automatic weekly or monthly set amount invoicing
Record Payments for clients
Customise Payment types and methods
Invoice & Payment reporting

Online Payments
Integration with Stripe
Take online payments from your clients
Let your clients pay their bills online

Custom work
Customised imports
Customised Reporting
Your company logo on dashboard

Consultancy
Set up consultancy support *
Ongoing consulting support *

* **Set up consultancy support**
Switching to a new system can be a stressful time for any business.
You may have lists of client data in many different spreadsheets that you need to tidy up and get imported to MindaClient .
Your staff may need training and hand holding to help the transition to MindaClient.
You might want to know how to set up a campaign. You might want us to review your processes to see how MindaClient can improve your business.
We have the expertise and experience to ensure that it is done right

* **Ongoing consulting support**
We can put together a tailored plan for your business that will ensure you get the best from your MindaClient.
We usually arrange a monthly face to face meeting where we can answer questions, upskill the MindaClient administrator, further train your staff and support you as your company grows using MindaClient.
So many clients who have been using MindaClient for a period are amazed when we show them the additional features available in MindaClient.

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