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Getting a Bigger Piece of the Pie

Client Relationship Management, or CRM, is a philosophy that permeates all aspects of a benefits agency. Whether you have software called CRM or not, if you are successful in today's challenging marketplace, the concept of focusing on your relationship with the client, rather than on the products you sell, has been the central focus of your firm for years.

There are dozens of tools to help automate your processes. Costs range from nothing* on up. Acronyms abound, like PIM, SFA, CRM, and XRM. You may believe you need to get your team communicating more effectively, sharing information better, simplifying procedures, and eliminating redundancies, but all the options are confusing and daunting. Changing your system requires a major commitment of time, money, and patience. How can you know you are making the right decision?

To help you get started in your analysis, click here for a copy of [Tools to Get a Bigger Piece of the Pie](#) discussing types of solutions and when each is the right fit. For more detailed information about your options, call Power Time at 800.780-0199.

Group Benefits CRM Users' Forum

Users and those interested in learning more about Group Benefits CRM are invited to join us **the third Friday of each month at 1:00 PM.** Our format is a 20-30 minute web information session followed by open Q&A.

Sessions will be instructional and/or cover areas of general interest to the group. Topics will be determined by the users.

This month's meeting, on June 19th, will give you an *Overview of Group Benefits CRM Features.*

Email susan@powertime.com to join or visit the forum

Looking for an Easy, Quick, and Powerful CRM Solution? Try Group Benefits CRM Power Start!

- The power of Microsoft Dynamics CRM
- The comprehensive benefit broker's feature set of Group Benefits CRM
- No server or software investment
- No long term contracts
- Be up and running in days, not weeks or month

