



Building Business for Growth

Presented by Accelo and SharpSpring



Ryan Butler

Business Development Manager, SharpSpring



John Scrugham

Solution Engineer, Accelo



Arielle Shnaidman

Product Marketing Manager, Accelo

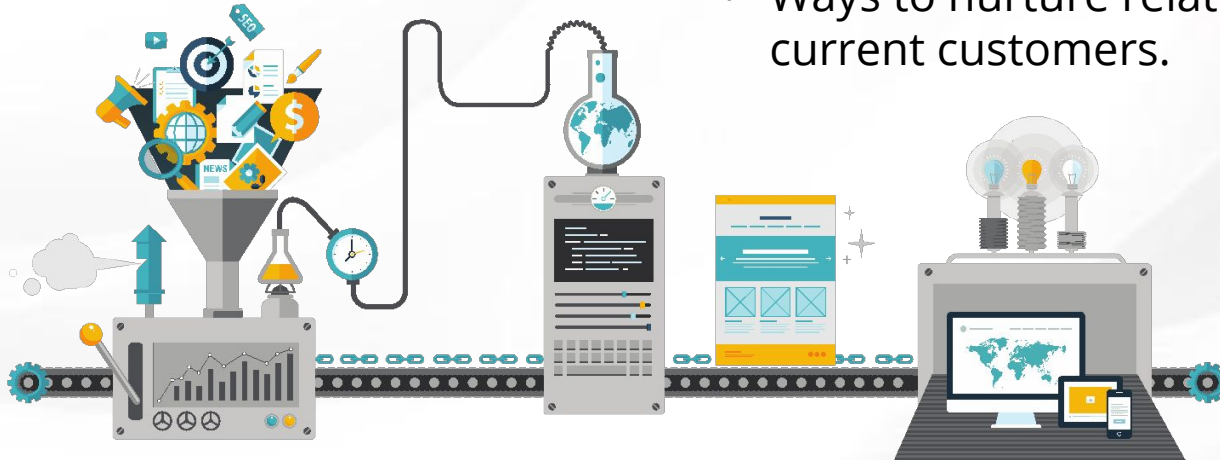
Greetings

Who's In The Audience

- SharpSpring Partner Agencies

Why Are We Here?

- How to automate operations and scale your service business using SaaS platforms.
- How to bring in more customers through a new business workflow.
- Ways to nurture relationships with current customers.



Housekeeping

Questions?

- Phone lines are muted
- Submit via Chat Box

Webinar Recording & Slides

- Emailed after webinar

Webinar Survey

- We need your feedback

Upcoming SharpSpring Webinar:

David Baker : Slim Down Your Services,
Bulk Up Your Revenue

July 27, 2017

11 a.m. – 12:00 p.m. EST

8-8:30 a.m. PDT

4-4:30 p.m. BST

Introductions



Ryan Butler

Business Development Manager, SharpSpring

As Business Development Manager, Ryan is responsible for developing partnerships and integration plans with platforms complementary to SharpSpring.



John Scrugham

Solution Engineer, Accelo

John Scrugham is a Solution Engineer at Accelo. He loves geeking out on user interviews, workflows, and personas.



Arielle Shnaidman

Product Marketing Manager, Accelo

Arielle Shnaidman is the Product Marketing Manager at Accelo. She loves solving for the customer, and really getting to know the people using her product.



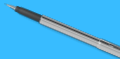
Building Business for Growth



SharpSpring



accelo



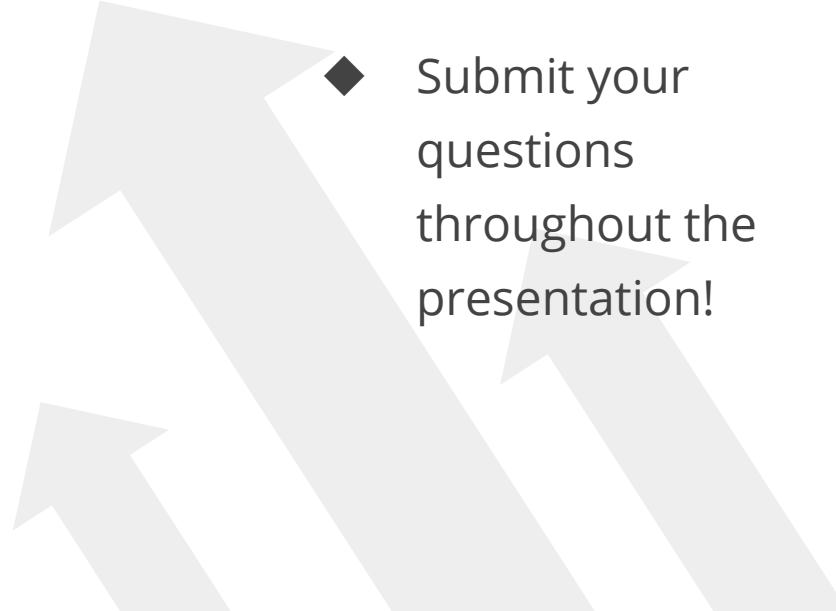
Agenda

Design for Growth (30 mins)

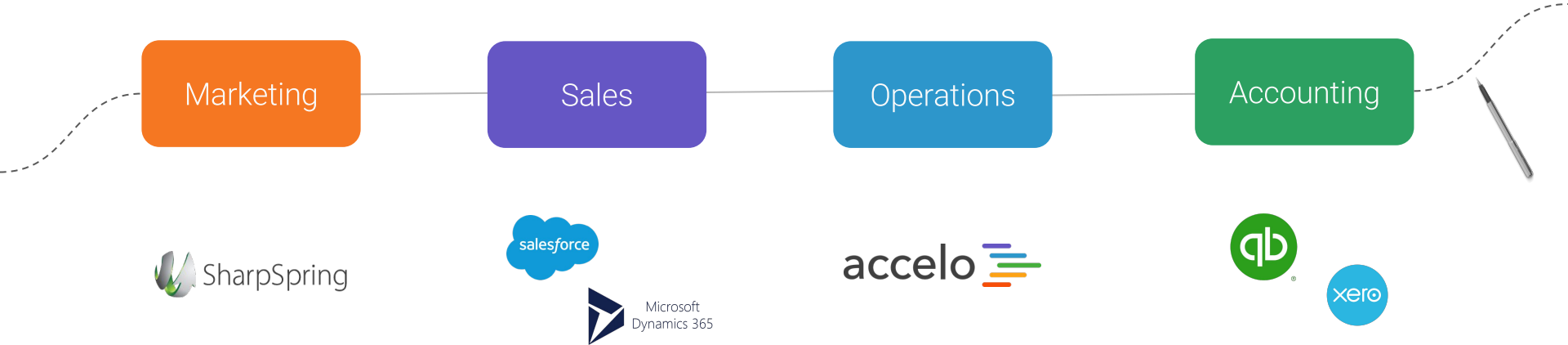
- ◆ Business Design & Operations
- ◆ Selling Services
- ◆ Managing Projects
- ◆ Handling Client Requests
- ◆ Delivering Ongoing Service
- ◆ Guiding Tasks & Time
- ◆ Utilizing Resources
- ◆ Billing & Getting Paid

Q&A (10 mins)

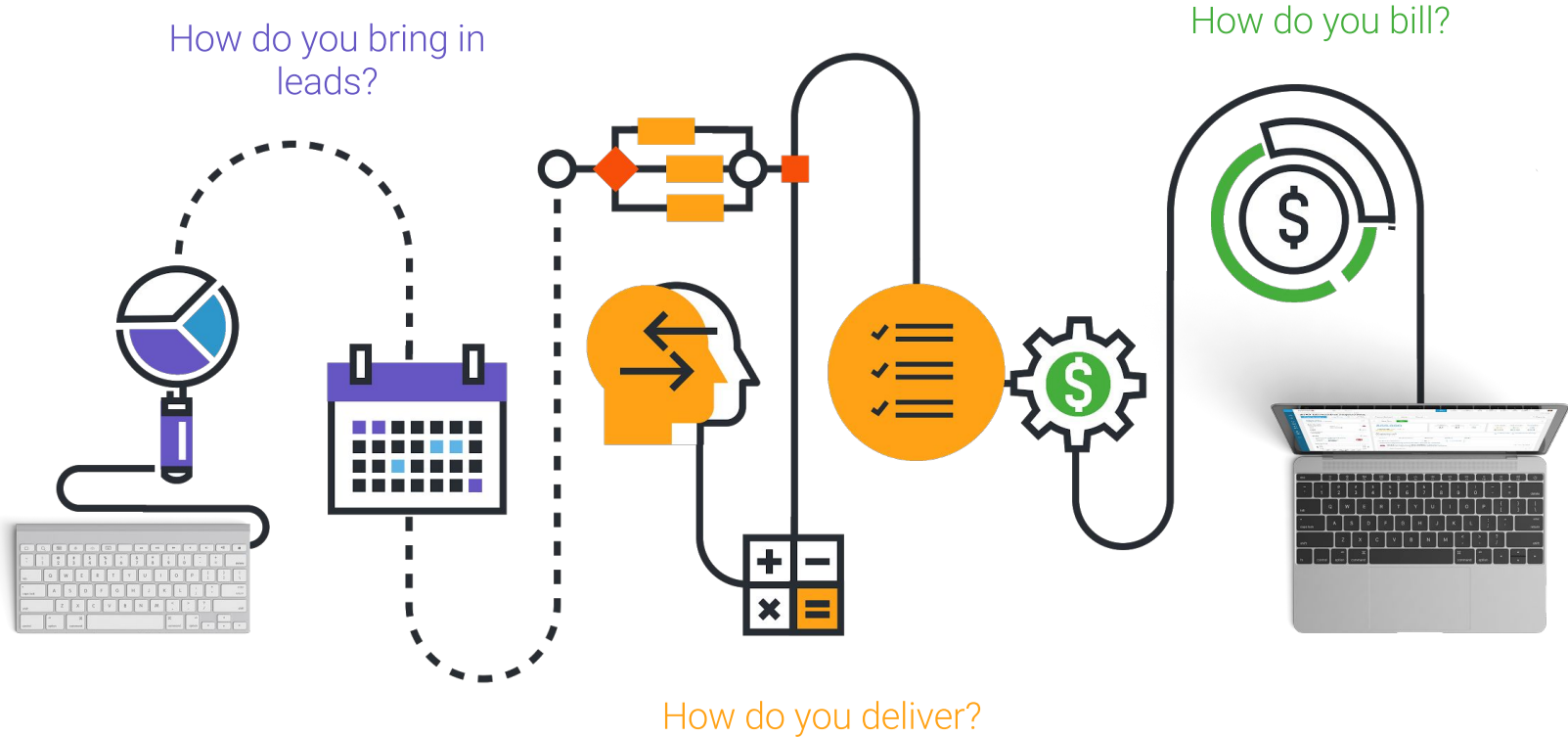
- ◆ Submit your questions throughout the presentation!



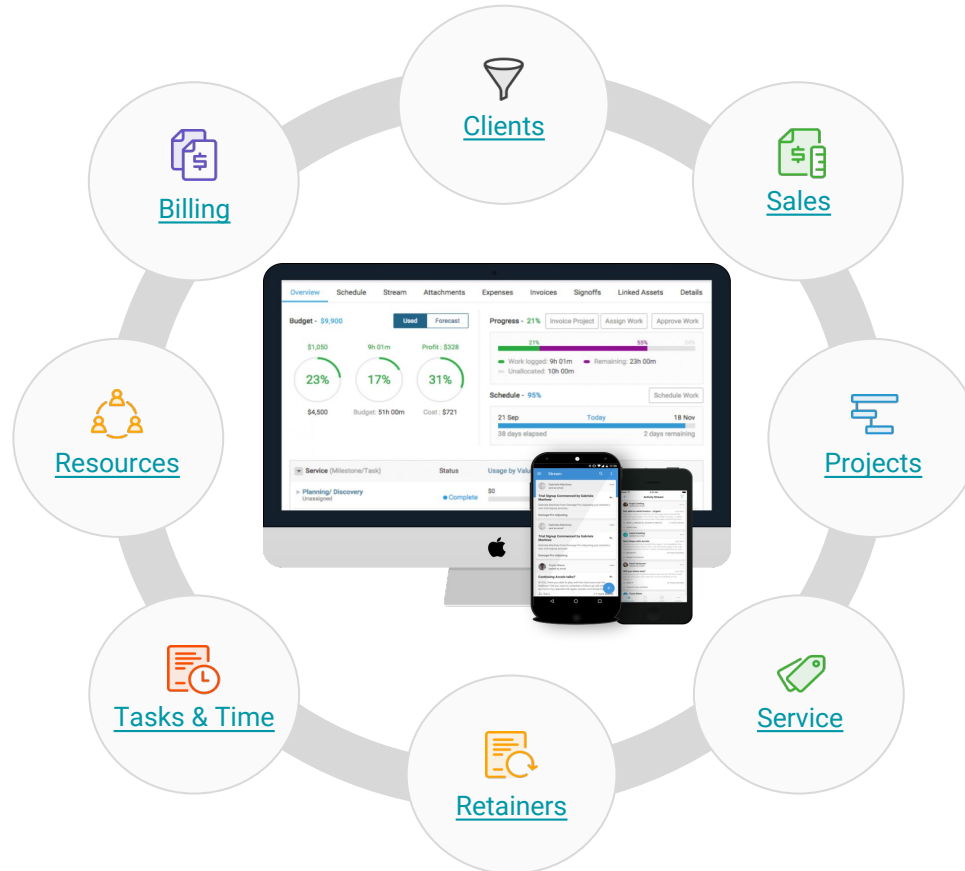
Business Design for Growth



Service Operations Design



What Service Operations Automation looks like

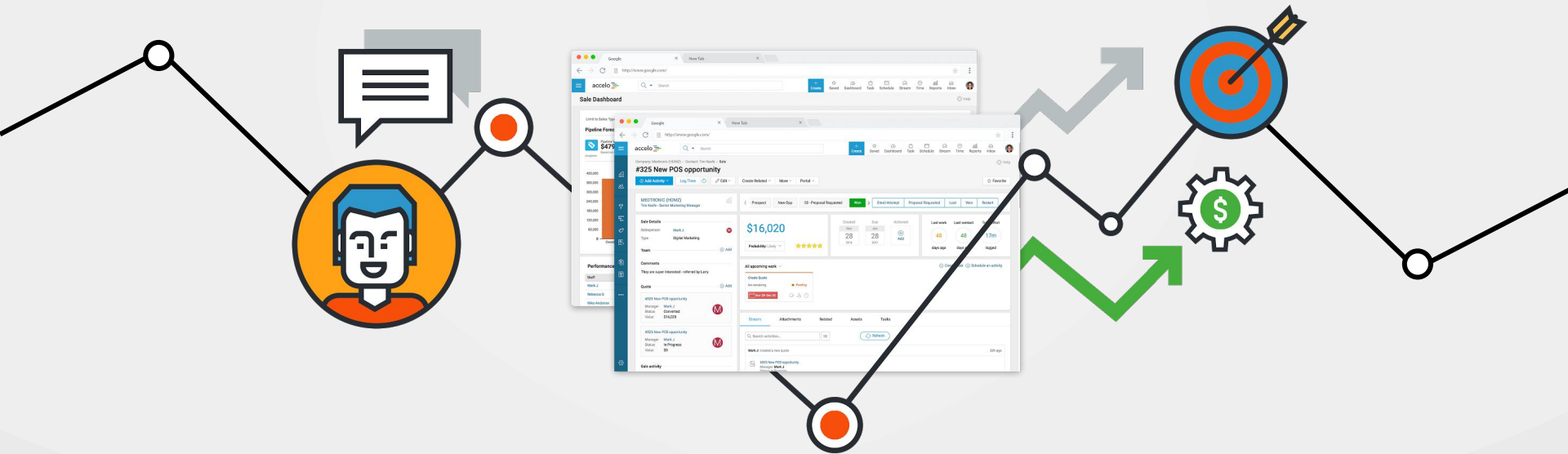


Your customers in one place



Pending

Selling services



Hiring a dedicated sales team

Sales Title	Type	Salesperson	Created	Due Date	Last contact	Status	Rating	Value
#226 - Branding Medipoint - Tracy McGuire	IT Consultation	Rebecca G	01/05/2016	09/01/2016	229 days ago	Proposal Sent	★★★★☆	\$30000
#198 - Outsourced CPA (year) LIFX (HPC) - Jess Goss	Bookkeeping	Bruce Phillips	09/10/2015	09/21/2016	139 days ago	New Opp	★★★★☆	\$30000
#243 - Partnership Lead Newport Surfboards - Jimmy Pesto	Digital Marketing	Rebecca G	02/26/2016	09/25/2016		New Opp	★★★☆☆	\$1500
#298 - Lake Savers Marketing Deal Lake Savers - Alden Sonner	Digital Marketing	Mark J	08/03/2016	09/02/2016	27 days ago	New Opp	★★★★☆	\$7000
#259 - MD Revolution MD Revolution - James Knoll	IT Consultation	Mark J	03/21/2016	09/29/2016	70 days ago	08 - Negotiating	★★★★☆	\$70000
#230 - Medipoint Website Medipoint - Tracy McGuire	Digital Marketing	Mark J	01/21/2016	09/25/2016	12 days ago	05 - Quote Sent	★★★★☆	\$1500
#286 - New opportunity?							★★★★☆	

All hands on close

Lead

In Contact

Quote Requested

Lost

Quote Sent

Won

\$50,000

Probability: Likely ▾

★★★★★

Created

Aug

30

2016

Due

Sep

22

2016

Actioned

+

Add

Last work

3

hours ago

Last contact

24

minutes later

Total effort

3h 02m

logged

My upcoming work ▾

+ Create Task

+ Schedule an activity

Review Proposal

RJT




Jul 17 11:00 - 12:00

Create website quote for Encinitas Brewery in Accelo

1h 0m remaining

Started

Jul 17- Aug 01



Did some work on the quote

J

John Smith created a note ▾

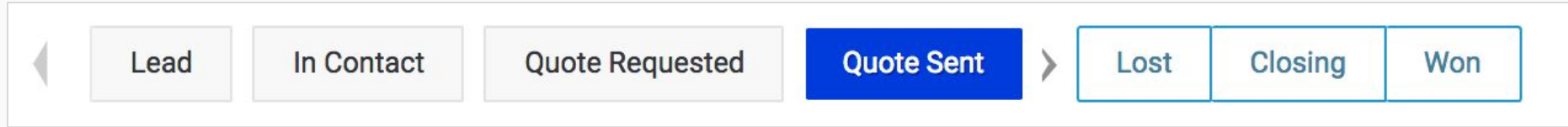
Just Now

- color - development time

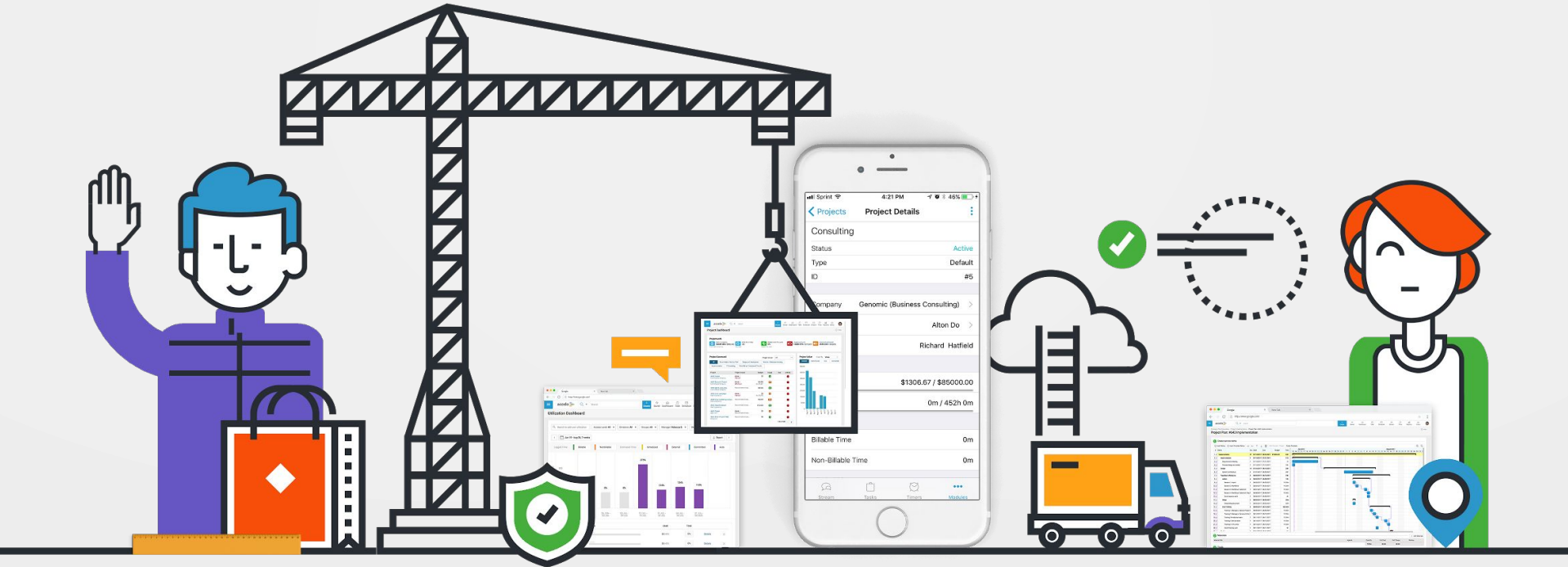
Reply To John Smith...

⌵

Alerts to keep the sale moving



Managing profitable projects



Delivering more, smaller projects

1 Create estimate service items

#	Name	Dur.	Budget	Hours
1	Website Build	48	\$15000.00	70h
2	Design	10	\$4000.00	20h
3	Development	10	\$8000.00	40h
4	QA	10	\$3000.00	10h

Taking on bigger projects

Milestones & Tasks	Status	Earned Value ▾	Budget	Start	Due
▶ Kickoff Unassigned	● Complete	\$0 / \$0 0%	3h 0m	Jul 17 ▶	Jul 17
▼ Design Unassigned	● Complete	\$1,800 / \$2,000 90% <div><div></div></div>	21h 0m	Jul 17 ▶	Jul 17
📁 Mockups Unassigned	● Complete	\$1,000 / \$1,000 100% <div><div></div></div>	10h 0m	Jul 17 ▶	Jul 17
📁 Wireframing Unassigned	● Complete	\$800 / \$1,000 80% <div><div></div></div>	10h 0m	Jul 17 ▶	Jul 17
📁 Obtain client approval Unassigned	● Complete	\$0 / \$0 0%	1h 0m	Jul 17 ▶	Jul 17
▼ Development Unassigned	● Active	\$1,000 / \$20,000 5% <div><div></div></div>	100h 0m	Jul 17 ▶	<u>Aug 14</u>
📁 Code HTML Unassigned	● Started	\$1,000 / \$10,000 10% <div><div></div></div>	50h 0m	Jul 17 ▶	<u>Jul 28</u>
📁 CSS theme Unassigned	● Pending	\$0 / \$5,000 0% <div><div></div></div>	25h 0m	<u>Jul 18</u> ▶	<u>Jul 31</u>
📁 Test Unassigned	● Pending	\$0 / \$5,000 0% <div><div></div></div>	25h 0m	<u>Aug 1</u> ▶	<u>Aug 14</u>
▼ Go-Live Unassigned	● Pending	\$0 / \$0 0%	6h 0m	<u>Aug 15</u> ▶	<u>Aug 16</u>
📁 Go-Live Checklist Unassigned	● Pending	\$0 / \$0 0%	5h 0m	<u>Aug 15</u> ▶	<u>Aug 15</u>
📁 Client Approval Unassigned	● Pending	\$0 / \$0 0%	1h 0m	<u>Aug 15</u> ▶	<u>Aug 16</u>

Using Intellectual Property to increase margins

We help businesses drive revenue thru email & mobile marketing.



Easy-to-use technology

24x7x365, our mobile engagement platform allows you to reach your audience in the way they want to be reached: Email & Text Messaging.

[Read More](#)



Your success

Our job is to help you be successful. With so many choices, it's easy to become overwhelmed. We guide you to the right solutions.

[Read More](#)



Access Anywhere

Desktop. Tablet. Smartphone. All the information from the Cloud whenever you need it.

[Read More](#)



Don't wait! Influence your customer's behavior

Our multi-channel messaging platform can influence your customer to come back. Our entire philosophy focuses around the "come-back", there is no easier way to do this than on mobile.

[Read More](#)



High tech, yes; but also high touch

When you want to ask a question, you won't get much from software alone. At mobileStorm, we have a whole in-house group of overachievers that can't wait to personally engage you.

[Read More](#)



We've got you covered

From strategy to compliance, account management & customization, we have solutions for any-sized business.

[Read More](#)



Manage customer relationships anytime, anywhere

Affinity is a flexible web-based client relationship management (CRM) system that provides enterprise wide access to critical client information.

[Product Info](#)



Online knowledge management made easy

Nucleus is a powerful web-based platform that helps you manage your knowledge with exceptional security & flexibility through your intranet, extranet or email.

[Product Info](#)

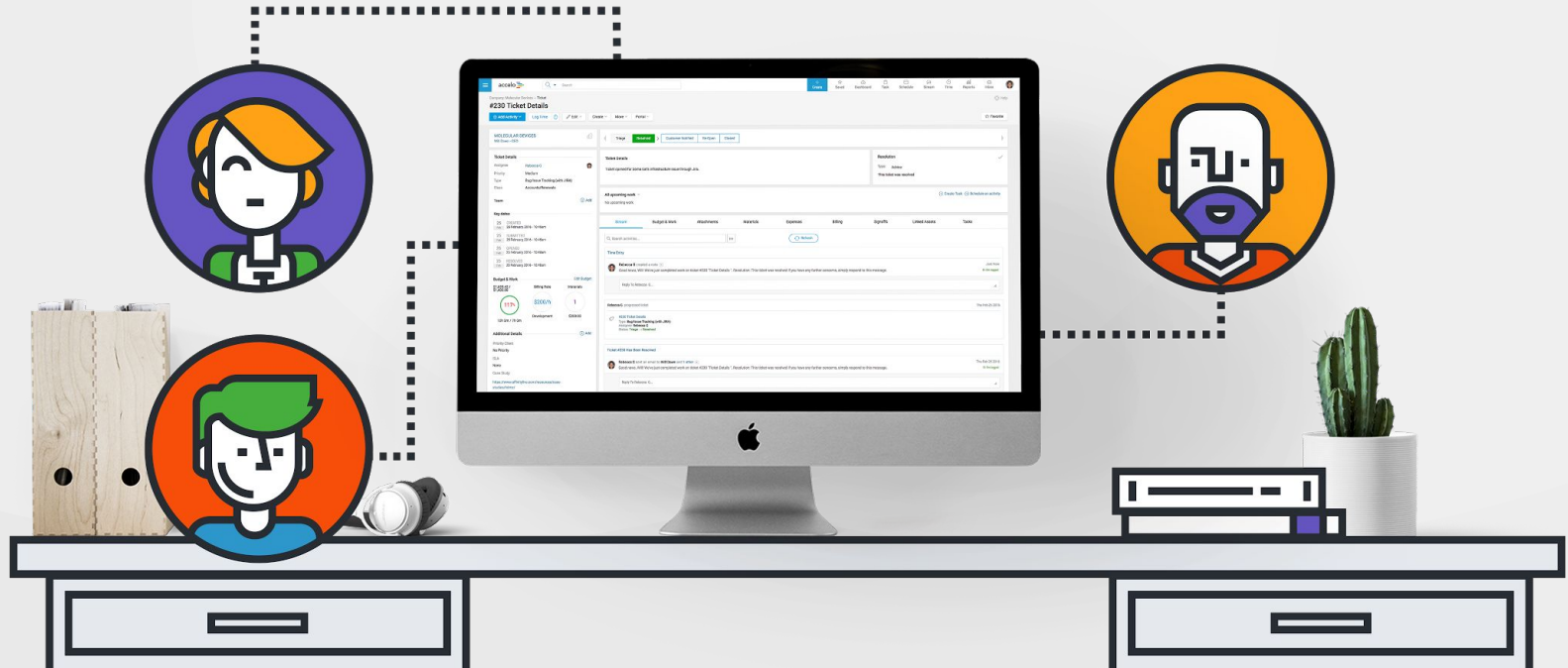


Simple, personalised messaging

Connect helps enhance relationships with customers and suppliers by making it easy to deliver personalised messages via email, SMS or fax.

[Product Info](#)

Handling of client requests




Connect requests to work

I can't login anymoreSupport

✓ **Claimed By:** YouDefer Request

Big Bear Bike

Reply → Convert ▼ ✕ Close


 **Jason Dawl** <jason@bbb.com>

It keeps on saying "Site Creator URL" is wrong. What does this


Thanks so much in advanced for helping out!

New Ticket
New Project
New Sales Opportunity


minutes ago)

 **Jason Dawl**

It keeps on saying "Site Creator URL" is wrong. What does this me

 10:24 AM

View ↩ Reply ▼ ↗ Relocate






 **John Smith** <lojohn@comcast.net>

To: Jason Dawl ▼

10:25 AM (6 minutes ago)
1m logged

We'll get right on it! Thanks for writing in Jason :)

Cutting down on effort to manage small work

ID #	Subject	Assignee	Last Contact	Bill.Hrs	Status	Age	P
#28	I can't login anymore Big Bear Bike	James Dev	22 minutes	01m	● Open	25 minutes	
#27	Need some help with logins Big Bear Bike	James Dev	2 hours	1h 31m	● Resolved	2 hours	
#25	Can you resize the image? Carlsbad Pizza	James Dev	21 days	31m	● Resolved	21 days	
#24	Issue with the website Encinitas Brewery	James Dev	22 days	37m	● Resolved	22 days	
#20	I need help with a small job Pomona College	James Dev	57 days	1h 31m	● Open	57 days	

Delivering consistent, ongoing work



Upsell and Cross-Sell

American Airlines

Frequently Contacted



Tracy McGuire

tracy.mcguire@aa.com



Comments

This is a VIP customer of ours. Tracy is married to Jason at our company.

Company Details

Status Active

Created Jul 05, 2014

Account Managers



Tags

Pre-2015 Customer



Sales

Salesperson

Value Rating

Due Date

Status



Marketing Automation

Richard Hatfi...

\$25,0...

★★★★★

No due da...

● Pitch

Thu Jul 6
2017



Projects

Manager

Earned Value

Status



Website & Booking App

Richard Hatfi...

\$2,800 /
\$22,000

12%

● Planned



Services

Assignee

Billable
Hours

Budget Due

Status



Add Social Media

Eddie Moon

0:00:00

No due da...

● Open



Retainers

Type

Price & Duration

Status



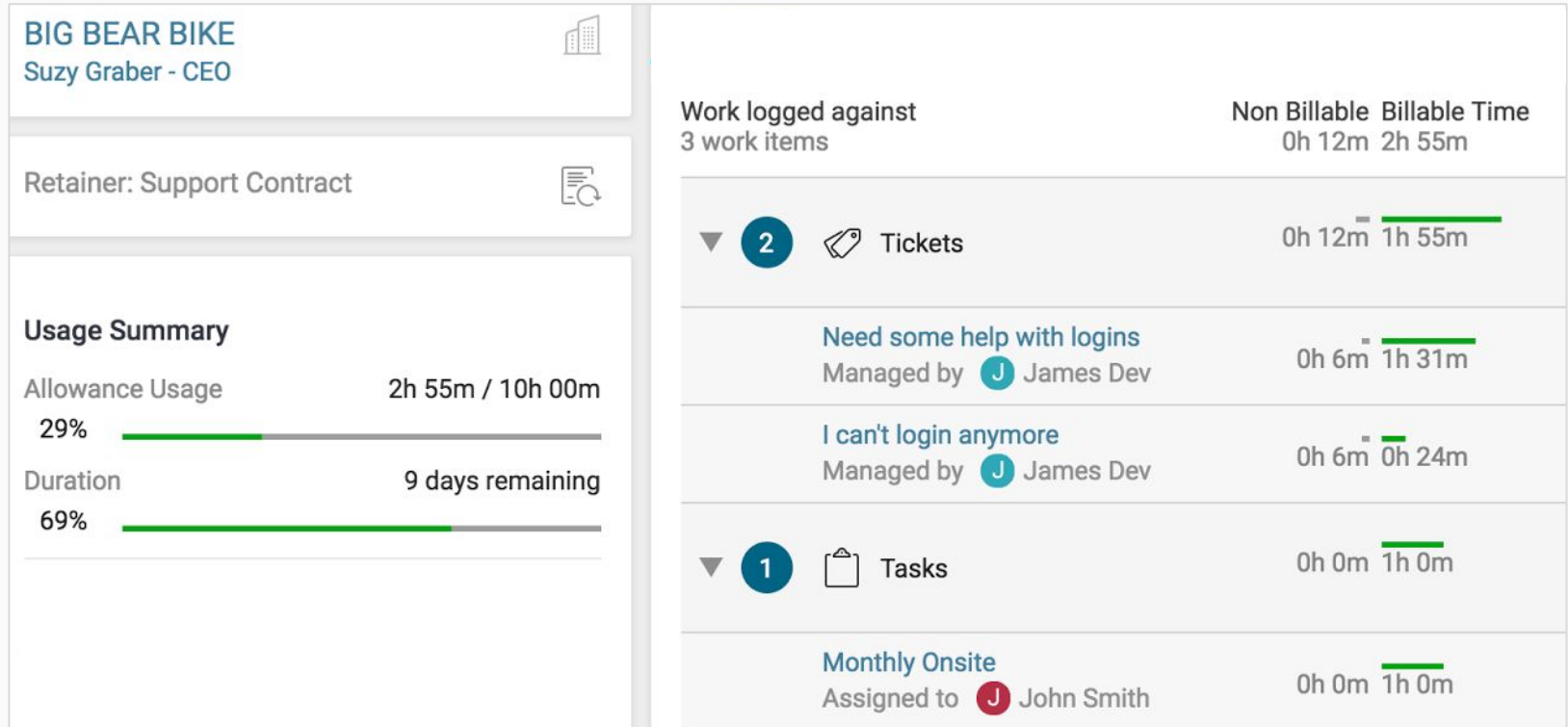
SEO Ongoing Monthly

Pre-Pai...

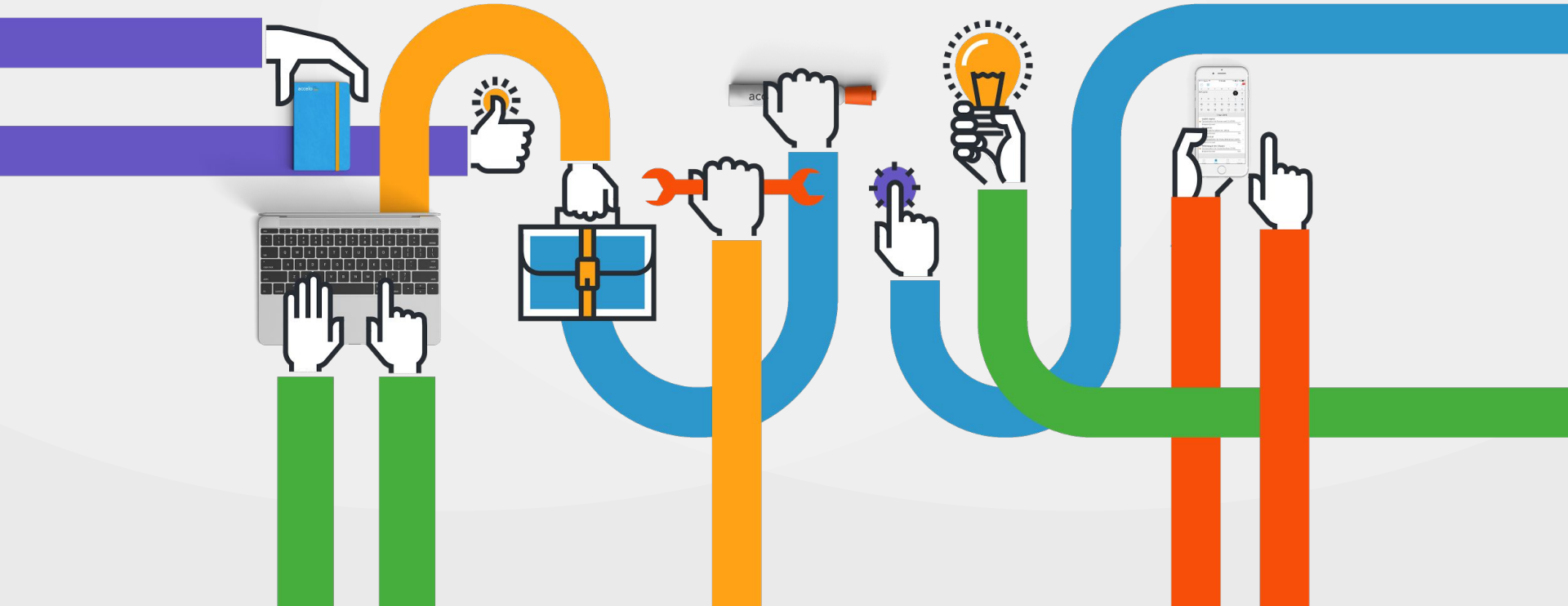
\$2,500 each month

● Active

Over service or under delivering alerts



Guiding the team's work & time



Universal Tasks

Pending (125)	Accepted (9)	Started (9)	Completed (2)
<div><div>Account Management Check-in</div><div>2h remaining</div><div>Pending</div><div>Jun 08</div><div>LA Sports : Retainer / Contract : Jun 01, 2016 - Jun 30, 2016</div></div>	<div><div>Create quote for LA Sports in Accelo</div><div>40m remaining</div><div>Accepted</div><div>Jun 23</div><div>LA Sports : Tanner G : LA Sports</div></div>	<div><div>Quarterly Report</div><div>2h remaining</div><div>Started</div><div>Aug 25</div><div>Big Bear Bike : Example retainer / contract : May 24, 2016 - Jun 23, 2016</div></div>	<div><div>Create quote for La Brea Burgers in Accelo</div><div></div></div>
<div><div>Account Management Check-in</div><div>2h remaining</div><div>Pending</div><div>Jun 08</div><div>Downtown Lumber Mill : Monthly Contract : Jun 01, 2016 - Jun 30, 2016</div></div>	<div><div>Create quote for Venice Company in Accelo</div><div>0m remaining</div><div>Accepted</div><div>Jun 29</div><div>Venice Company : James Knoll : New Business Opportunity</div></div>	<div><div>Back End - PHP, SQL</div><div>26h 49m remaining</div><div>Started</div><div>Aug 15</div><div>SOMA Eats : Website : Dev</div></div>	<div><div>Create quote for Venice Boards in Accelo</div><div></div></div>
<div><div>Account Management Check-in</div><div>2h remaining</div><div>Pending</div><div></div><div></div></div>	<div><div>Create quote for Hollywood Signs in Accelo</div><div>1h remaining</div><div>Accepted</div><div>Jun 29</div><div></div></div>	<div><div>Design</div><div>12h 54m remaining</div><div>Started</div><div>Aug 16</div><div></div></div>	

Universal Time

<div>John Scrugham</div> <div>Type: All</div> <div>Daily Timesheet</div> <div>Jul 10 - Jul 16, 2017</div>								
Find work to add to your timesheet	MON Jul 10	TUE Jul 11	WED Jul 12	THU Jul 13	FRI Jul 14	SAT Jul 15	SUN Jul 16	TOTAL
<div>Task: Search Engine Optimization Content</div> <div>Company: Medtronic • Retainer: SEO Ongoing Monthly • Retainer Period: Jul 01, 2017 - Jul 31, 2017</div>	- 0:00	- 0:00	- 0:00	- 0:00	1 activity 1:00	- 0:00	- 0:00	1:00
<div>Task: User Interface Designer</div> <div>Company: Hardman Communications (IT Con... • Project: Strategy & Implementation • Milestone: Develop & Plan</div>	- 0:00	1 activity 10:00	- 0:00	- 0:00	- 0:00	- 0:00	- 0:00	10:00
<div>Service: #7 Website Down</div> <div>Company: Hardman Communications (IT Con...</div>	1 activity 1:00	- 0:00	- 0:00	- 0:00	- 0:00	- 0:00	- 0:00	1:00
Totals	1:00	10:00	0:00	0:00	1:00	0:00	0:00	12:00

Weekly Standup & Email Update In-Between

Overdue	Monday	Tuesday	Wednesday	No Deadline (0)
<div><div>User Interface Designer</div><div>35h remaining</div><div>Started</div><div>Jul 14</div></div>	<div><div>Data Collection / Site Inspection</div><div>8h remaining</div><div>Started</div><div>Jul 17</div></div>	<div><div>TO DO</div><div>2h remaining</div><div>Pending</div><div>Jul 18</div></div>	<div><div>Producer</div><div>0m remaining</div><div>Started</div><div>Jul 25</div></div>	
<div><div>Final Client Approval & Signoff</div><div>1h remaining</div><div>Pending</div><div>Jul 14</div></div>	<div><div>Survey Design</div><div>5h remaining</div><div>Started</div><div>Jul 17</div></div>	<div><div>Obtain client approval</div><div>0m remaining</div><div>Pending</div><div>Jul 18</div></div>	<div><div>Designer</div><div>50h remaining</div><div>Pending</div><div>Jul 31</div></div>	
			<div><div>Senior Analyst</div><div>80h remaining</div><div>Pending</div><div>Aug 15</div></div>	
			<div><div>Project Manager</div></div>	

Optimizing your team's schedule



Forecast vs. Actuals

Team

Work

Team Schedule

Type: Scheduled, Ext...

Viewing as: Week

August, 2016 - January 2017

Staff

Add new resource

David Johnston

dj@interiordesigns.com

Joel Green

joel@acme.com

Steven Smith

smith.332@icorp.com

Tim Edwards

ed554@mail.com

Jimmy Brown

brown.jim@rowequity.com

Kurt Stone

ks.433@codeimagined.com

Frank Gregory

gregory.james@portals.com

Remove

James Jackson

jj.finance@deptloans.com

Joshua Yates

yates@tde.edu

Scott Jensen

scott.jensen@iifte.com

Stacey Larasen

stacey.d.larase@ymfg.com

Vanessa Telaeter

telaeter.v@everclear.com

MAY

4-10

4-10

11-17

18-24

25-1

JUN

4-10

11-17

18-24

25-1

JUL

2-8

9-15

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23-29

AUG

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SEP

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17-23

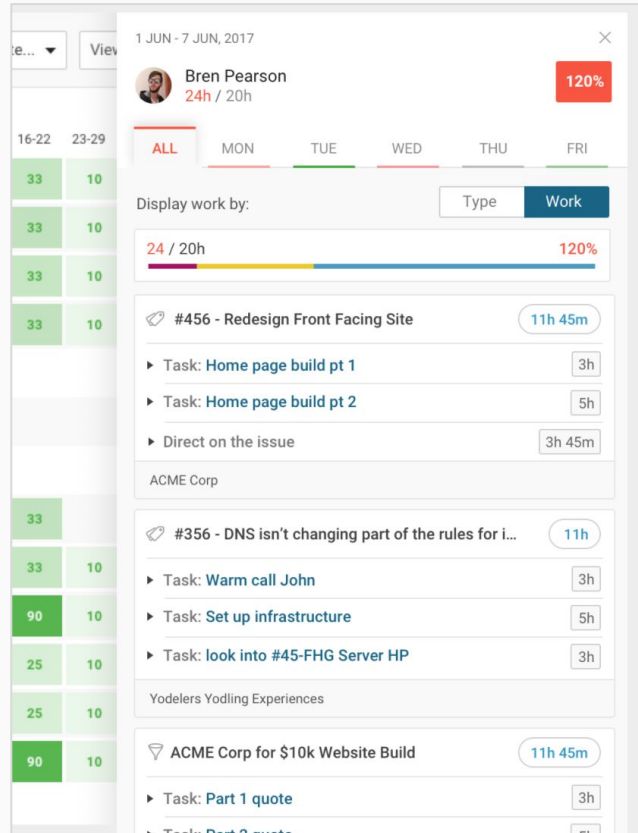
24-30

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36	24	24	24	30	38	38	33	38	38	38	25	33	25	10	25	25	45	10	10	66	10	10
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36	24	24	38	38	40	45	36															
36	24	36	38	36	40	45	36	10	10	10												
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120	24	24	33	38	40	10	33	45	10	10	33											
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40	25	40	33	40	36	25	36	33	36	36	36	25	36	33	36	36	36					

Well- utilized



Hiring Freelancers

Team

Work

Team Schedule

Type: Scheduled, Ext...

Viewing as: Week

August, 2016 - January 2017

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Add new resource

David Johnston

dj@interiordesigns.com

Joel Green

joel@acme.com

Steven Smith

smith.332@icorp.com

Tim Edwards

ed554@mail.com

Jimmy Brown

brown.jim@rowequity.com

Kurt Stone

ks.433@codeimagined.com

Frank Gregory

gregory.james@portals.com

Remove

James Jackson

jj.finance@deptloans.com

Joshua Yates

yates@tde.edu

Scott Jensen

scott.jensen@iifte.com

Stacey Larasen

stacey.d.larasen@ymfg.com

Vanessa Telaeter

telaeter.v@everclear.com

MAY

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20-26

SEP

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27-2

17-23

24-30

OCT

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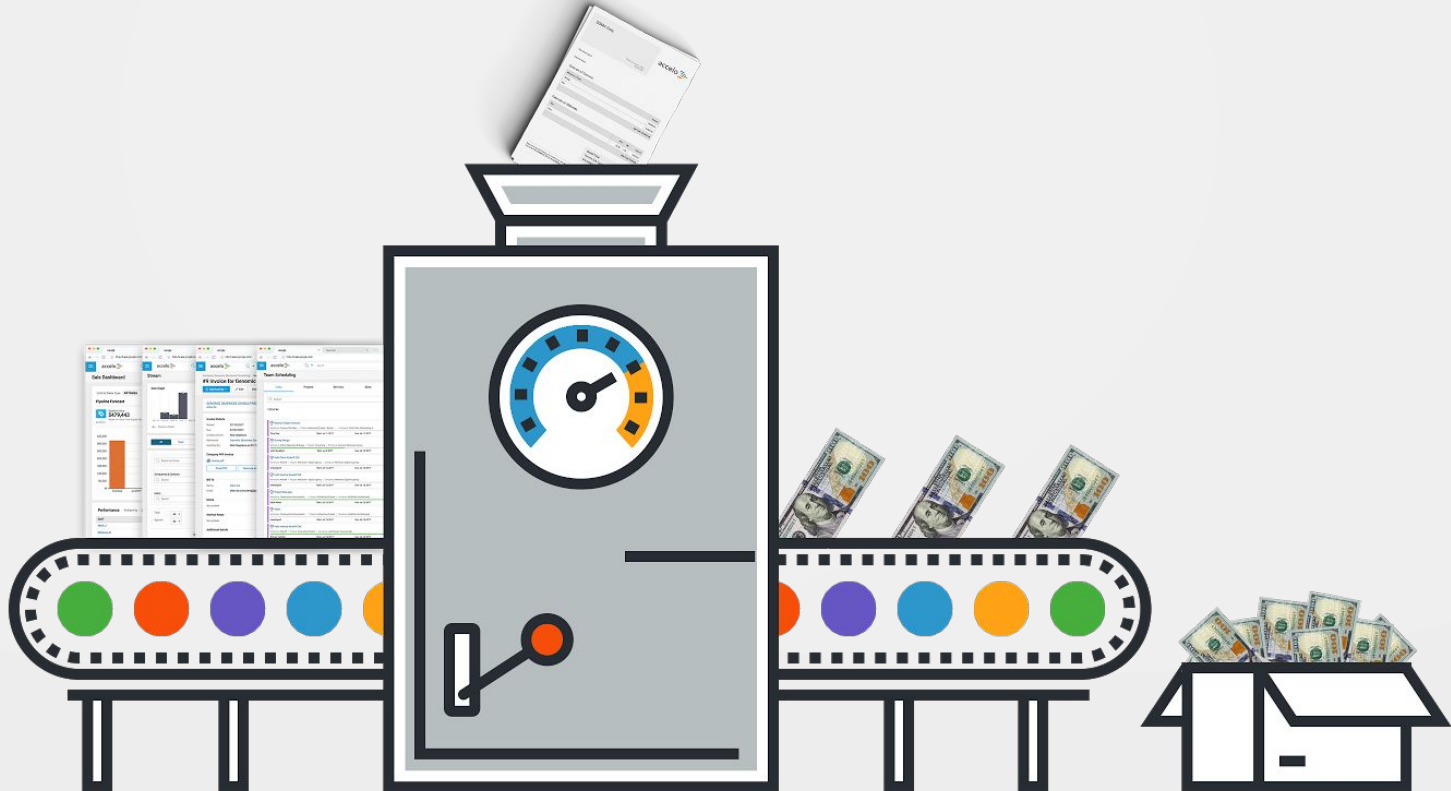
33

36

36

36

Billing & getting paid



Automating work done to payment

No Previous status

Planned

Activate Project

Project Complete

Pause Project

Cancel Project

Overview

Schedule

Insights

Materials

Expenses

Billing

Details

Status: All

Manager/Assignee: All

Edit Plan

Add Task

Search







Milestones & Tasks	Status	Earned Value	Budget	Start	Due	Actions
<div><div></div><div>Kickoff</div><div>Unassigned</div></div>	<div><div></div><div>Complete</div></div>	<div>\$0 / \$0</div> <div>0%</div>	3h 0m	Jul 17	Jul 17	<div><div></div><div></div><div></div></div>
<div><div></div><div>Design</div><div>Unassigned</div></div>	<div><div></div><div>Complete</div></div>	<div><div>\$1,800 / \$2,000</div><div>90%</div></div>	21h 0m	Jul 17	Jul 17	<div><div></div><div></div><div></div></div>
<div><div></div><div>Development</div><div>Unassigned</div></div>	<div><div></div><div>Active</div></div>	<div><div>\$1,000 / \$20,000</div><div>5%</div></div>	100h 0m	Jul 17	Aug 14	<div><div></div><div></div><div></div></div>
<div><div></div><div>Go-Live</div><div>Unassigned</div></div>	<div><div></div><div>Pending</div></div>	<div>\$0 / \$0</div> <div>0%</div>	6h 0m	Aug 15	Aug 16	<div><div></div><div></div><div></div></div>

Delivering Value

Invoice for Medtronic

Attention: Tracy McGuire

Please contact John Scrugham for any queries about this invoice.

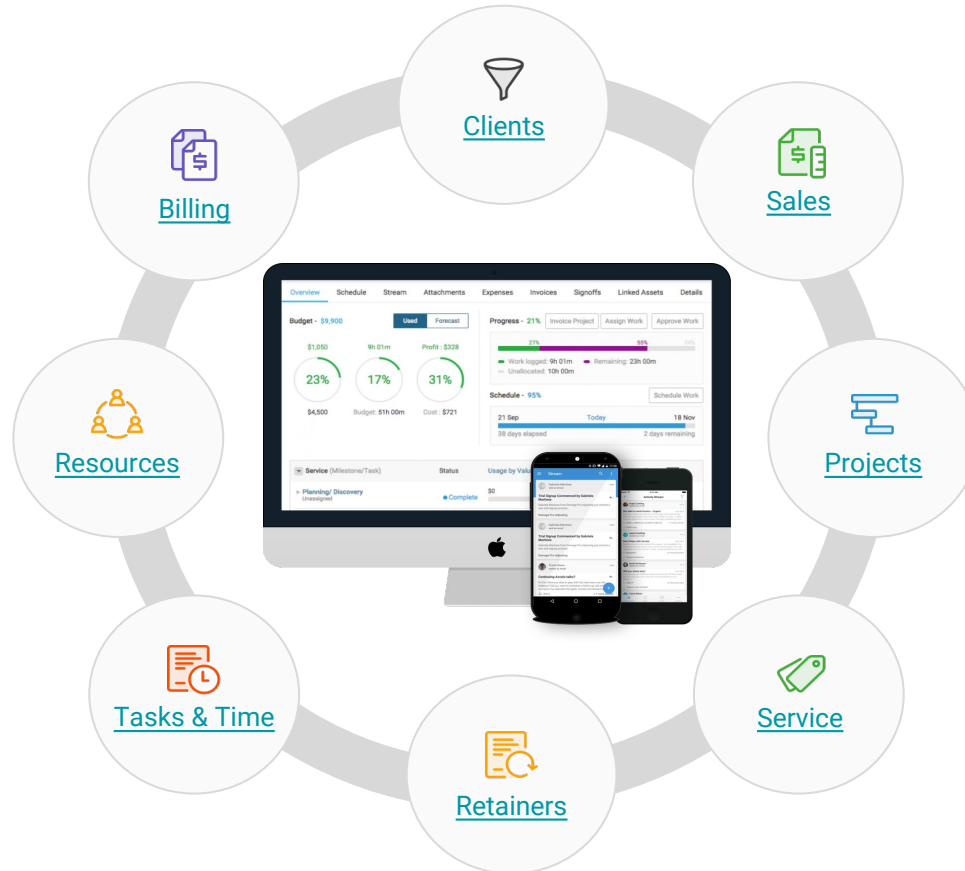
Date	Subject / Desc	Owner	Time	Rate	Amount
 07/17/2017	Time Entry - Mockups Put together all of the Invision mockups and the workflows	 John S.	10h 0m	\$100.00	\$1,000.00
 07/17/2017	Put together the workflow - Logins - Home - Checkout	 John S.	8h 0m	\$100.00	\$800.00
 07/17/2017	Scheme Basic website details set	 John S.	5h 0m	\$200.00	\$1,000.00

Sub-total **\$10,800.00**

Tax **\$280.00**

Total **\$11,080.00**

What Service Operations Automation looks like





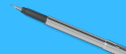
Q&A



SharpSpring



accelo



Continue the Conversation

With Ryan:



Ryan Butler

Business Development Manager,
SharpSpring

Email: ryan.butler@sharpspring.com

Web: www.sharpspring.com

With John and Arielle:



John Scrugham

Solution Engineer, Accelo

Email: john.scrugham@accelo.com

Web: www.accelo.com

Arielle Shnaidman

Product Marketing Manager, Accelo

Email: arielle.shnaidman@accelo.com

Web: www.accelo.com

