

The effortless way to manage your time and fees...



What is CRM?

CRM or **Client Relationship Management** is about managing relationships with your clients and others to ensure these relationships are as mutually beneficial as possible.

HAVE A 360° VIEW OF YOUR BUSINESS AND ITS CLIENTS.

CRM can bring many benefits to your practice. The focus is on increasing client satisfaction and loyalty.

Partners and the senior management team will have the tools to be fully in control of the business and can enjoy full awareness of everything important that happens. You will benefit from a 360° view of your business and its clients.

Internal communication and team working are greatly improved. Your employees can work effectively in a coordinated way and be fully armed with all the information they need at their fingertips. Clients and potential clients will perceive a helpful, efficient and professional organisation.

CRM will provide essential visibility and structure to marketing and business development activities, allowing you to target your resources at the most profitable clients while at the same time, winning and developing profitable new clients.

A CRM solution will bring together all information related to your clients and what you do for them so that you can manage it effectively. Client facing employees are then able to make quick and informed business decisions.

CRM is not software.

CRM is a business strategy designed to reduce costs and increase profitability through improving client loyalty.

CRM CAN BRING MANY BENEFITS TO YOUR PRACTICE. THE FOCUS IS ON

**INCREASING
CLIENT SATISFACTION
AND LOYALTY.**

About Flightdeck for Accountants

Flightdeck puts you in complete control of your organisation by combining a powerful CRM system with effortless invoicing of time and fees.

BE ALERTED TO SITUATIONS AS THEY DEVELOP WITHIN THE BUSINESS.

It brings together all relevant information from across your business – such as what you do for your clients, how you provide service and support, what contracts you have in place with them, financial information etc.

Valuable insight is provided into where improvements could be made within the business. Flightdeck can measure KPI's and allow you to distinguish between your best clients and those you've not had much business with. You are also able to monitor budgets, plan projects and work out profitability.

Flightdeck combines these CRM features with effortless invoicing of time and fees.

At the heart of Flightdeck, Invoice Manager is simple, accurate and easy to use. At the click of a button it allows you to organise and display data and move time around between jobs, leaving you with more time to focus on other important areas of the business.

- **Manage Time and Fees effortlessly**
- **Manage relationships with clients**
- **Improve team working and communication**
- **Gain tighter control of your business**
- **Be organised and paper-free**

BRING TOGETHER AND
MANAGE EFFECTIVELY
ALL INFORMATION
FROM ACROSS YOUR
PRACTICE.

How does it work? It's easy. And we'll show you that using these examples...

CLIENT

Keep everything you need to know about your client in one location making it quick and easy to gain access to contacts, invoices, job history, activities etc.

Name	Position	Department	Telephone	Email	Mobilephone
David Dak	Finance Director	Accounts/Finance		david@ruytonhardwoods.co.uk	07973 654321
Joan Ash	Administrator	Accounts/Finance	01939 123123	joan@ruytonhardwoods.co.uk	
Mark Hart	Managing Director	Director/Management	01939 123123	mark@ruytonhardwoods.co.uk	07973 123456

JOB

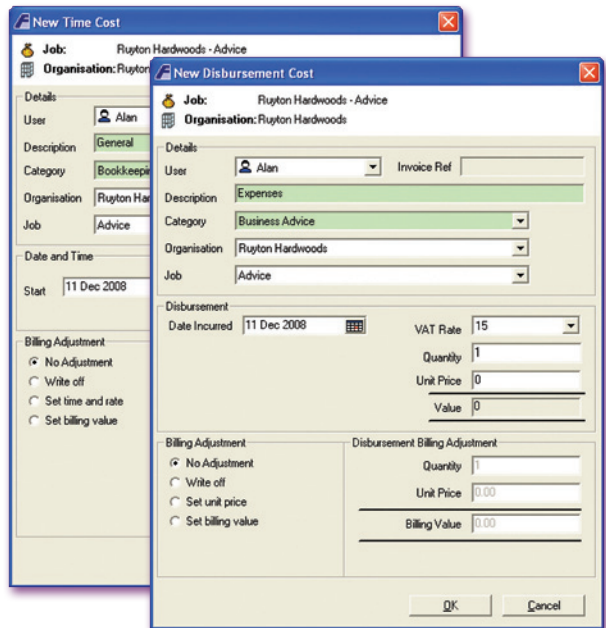
This form provides a break down of time costs and disbursements that are associated with a particular job. All notes and activities that relate to a job such as phone calls, emails, meetings, documents and invoices can be stored here along with progress details.

StartDate	Description	Note
15/05/2007	Catch up call	
02/07/2007	Chase their response to the meeting outcome	They would like to have a meeting about expansion plans
04/06/2007	Confirm the meeting	They want to go ahead with the expansion plans
	Latest accounts information	
14/06/2007	Meeting outcome	
12/06/2007	Meeting to discuss expansion planning	
	They need some advice!	
31/05/2007	When do they want to meet?	12th June is best for them

TIME AND DISBURSEMENTS

Record time effortlessly against all types of work carried out within your practice. Hourly rates are entirely flexible and can be based on employee, job type or client.

Log disbursement costs and associate them with a client, company or job record. Maintain a complete overview of disbursements at every stage.



INVOICE MANAGER

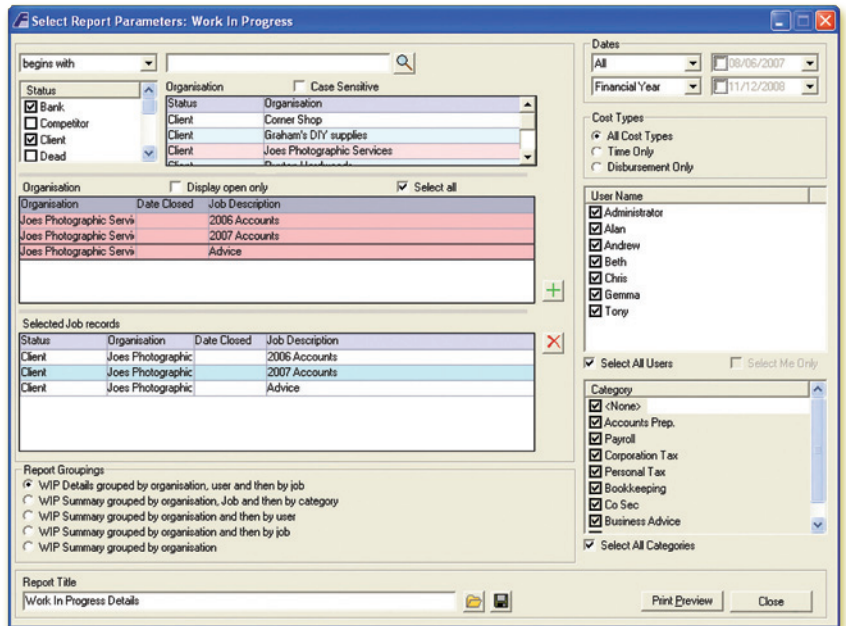
The Invoice Manager displays all WIP (time and disbursements) and invoice information relating to a job. Summary figures can be displayed for the whole grid or for selected items. There is an area to display unassigned costs and pick them up which ensures no recorded time can be misplaced or forgotten about. There is also an area to display written off costs. It is easy to transfer time and disbursements between jobs. The whole process of managing time and fees is very straightforward.

Invoice	Date	User	Category	Time/Qty	Unit Price	Value	Time/Qty	Unit Price	Value	VAT%	Recovery	U/D Rec.	Description
12 Jun 2007	Alan	Business Advice	3.00	£100.00	£300.00	3.52	£100.00	£351.74	17.50	117%		£51.74 Expansion Planning	
12 Jun 2007	Alan	Business Advice	20.00	£0.45	£9.00	20.00	£0.45	£9.00	17.50	100%		£0.00 Mileage to meeting	
12 Jun 2007	Alan	Business Advice	3.00	£45.60	£136.80	3.00	£45.60	£136.80	17.50	100%		£0.00 Lunch with David and Mark.	
13 Jun 2007	Alan	Business Advice	0.67	£100.00	£66.66	0.78	£100.00	£78.16	17.50	117%		£11.50 Discuss planning	
13 Jun 2007	Alan	Business Advice	2.17	£100.00	£216.66	2.54	£100.00	£254.03	17.50	117%		£37.37 Work on expansion plan	
13 Jun 2007	Beth	Business Advice	3.17	£75.00	£237.50	3.71	£75.00	£278.46	17.50	117%		£40.97 Research for expansion planning	
13 Jun 2007	Beth	Business Advice	0.67	£75.00	£50.00	0.78	£75.00	£58.62	17.50	117%		£8.63 Meeting with Alan about planning work.	
14 Jun 2007	Beth	Business Advice	1.83	£75.00	£137.50	2.15	£75.00	£161.21	17.50	117%		£23.71 research for expansion planning	
14 Jun 2007	Beth	Business Advice	1.00	£15.00	£15.00	1.00	£15.00	£15.00	17.50	100%		£0.00 Financial reports	
19 Jun 2007	Alan	Business Advice	0.75	£100.00	£75.00	0.88	£100.00	£87.94	17.50	117%		£12.94 Meeting about planning report	
19 Jun 2007	Beth	Business Advice	0.75	£75.00	£56.25	0.88	£75.00	£65.95	17.50	117%		£9.70 Meeting about planning	
20 Jun 2007	Beth	Business Advice	5.00	£75.00	£375.00	5.86	£75.00	£439.68	17.50	117%		£64.68 Writing report	
21 Jun 2007	Alan	Business Advice	1.08	£100.00	£108.33	1.27	£100.00	£127.02	17.50	117%		£18.69 Review report	
21 Jun 2007	Chris	Business Advice	0.83	£50.00	£41.67	0.98	£50.00	£48.85	17.50	117%		£7.19 Printing and binding report	
21 Jun 2007	Chris	Business Advice	1.00	£20.00	£20.00	1.00	£20.00	£20.00	17.50	100%		£0.00 Pinning and binding	
26 Jun 2007	Alan	Business Advice	2.50	£100.00	£250.00	2.93	£100.00	£293.12	17.50	117%		£43.12 Present plan	
26 Jun 2007	Alan	Business Advice	20.00	£0.45	£9.00	20.00	£0.45	£9.00	17.50	100%		£0.00 mileage	
17 Nov 2008	Alan	Bookkeeping	2.83	£110.00	£311.66	3.32	£110.00	£365.42	17.50	117%		£53.76 Bring up to date	

About Reporting

CREATING REPORTS...

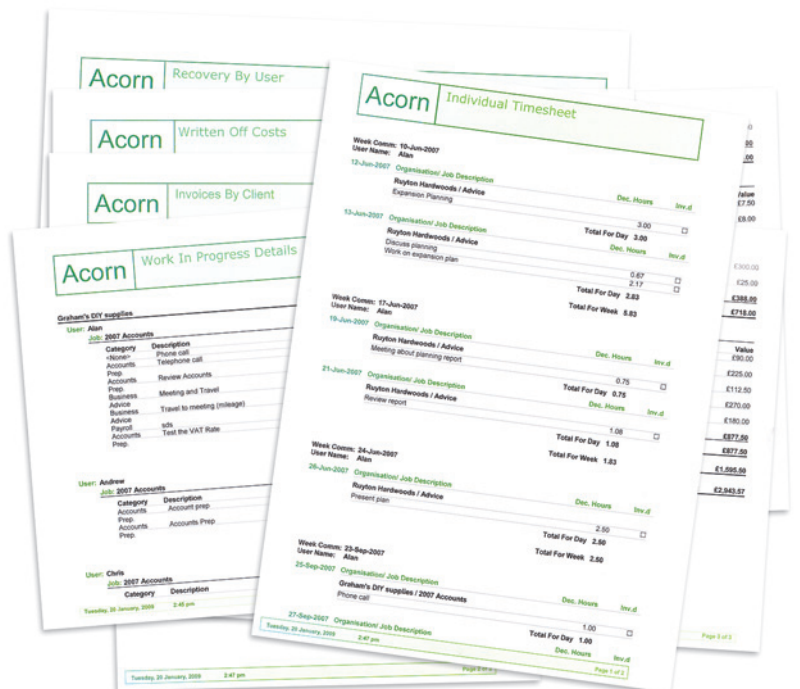
To create a report you simply select criteria from the report parameters within Flightdeck. The reports can be reviewed at many different levels; by individual clients, jobs, users or categories to give senior management complete control over all work carried out, the time spent on jobs and what needs to be invoiced.



Flightdeck comes with a wide selection of printable, built-in reports including WIP, recovery and timesheets. You are able to examine and manage information at job, client, fee-earner and various other levels.

You can choose to report on categories such as Payroll, Invoicing, Bookkeeping, Accounts or Personal Tax and then select whether you want to view by financial or calendar year or by certain users.

Flightdeck also allows you to create and design your own reports which break down and display information into further useful, easy to view layouts.



MyFlightdeck

The purpose of MyFlightdeck is to support each user with their daily responsibilities, enabling them to work more effectively.

We configure MyFlightdeck around each individual's requirements to display the specific information that is needed to carry out their job.

MyFlightdeck can be used at Management level to display KPI's for the business and provide a 360° view of what's going on within the organisation.

Using MyFlightdeck increases productivity, leaving more free time to spend on other areas of the practice such as building relationships with clients.

The screenshot shows the MyFlightdeck application window. It is divided into several sections:

- ASSIGNED TO ME:** Contains a table for 'Open Jobs Assigned To Me' and a large table for 'WIP on my Jobs' with columns for Name, Description, Date, User, Time, and Description.
- ALL:** Contains a 'Current Jobs' section with a table listing Client, Description, CreatedBy, and TotalApproxValue. Below it is a 'Work In Progress' section with a table listing Client, Job, WIP, and Latest Cost.
- Invoices:** A table listing InvoiceRef, Invoice Date, Name, Value, Time value, Disbursement, Status, Job, and Description.

This example is built around a senior partner's requirements; on the left it displays all their open jobs with the WIP underneath; on the right it displays other internal jobs and WIP. Having this extra information to hand provides the partner with far greater control over the practice and frees up time to generate more new business.

Want to find out more?

It's easy. Just give us a call on **0800 652 73 73** or send an email to info@flightdeckcrm.co.uk

If you want to take your interest further, we will arrange for one of our team to take you through an online demonstration of Flightdeck; or, if you prefer, we can organise an exploratory meeting to determine broadly how Flightdeck might be implemented in your practice.

At the heart of our solutions we use our Flightdeck software which is configurable at a fundamental level. We partner with you to deliver Flightdeck in a service based way which focuses on your business needs.

We know that Flightdeck is not going to be the most appropriate solution for every business and we will tell you if we don't think Flightdeck is right for you.



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