

Building the Consultant Practice of Tomorrow Using Today's Online Tools

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Consultant

- Incorporated 1996
- Provide software consulting services to a variety of industries:
 - Semiconductor
 - Healthcare
 - Software Marketing
 - Retail
 - Wholesale Distribution
 - Manufacturing
 - Financial Services



Micro Computer Operating Systems

- Associate Engineer
- Supported custom OS
- Supported roll out of new compiler
- Training Classes for large customers



Data Communication/ Mini Computer Operating Systems

- Software Engineer / Senior Software Engineer
- Supported variety of data communication protocols
- Board level and Kernel level device drivers

- Moved to Sales
 - Regional Technical Consultant
 - 17 Western States
 - 6 primary branches
 - 12 dealerships
 - 10 Industry partners



Semiconductor Material/Safety Monitoring System

- One of five developers of PC based product
- Spent 3 years installing at FABs worldwide
- Approximately 80% of world's semiconductor FABs used system



Introduction

- Business is now driven from the Web
- Online tools can transform your practice
- Time equals money, online can help you with both
- Today's technology can be used to build your business for tomorrow

Three Transformational Technologies

- E-Mail Automation Services
- Online Meeting/Support Services
- Shared File Services

E-mail Automation Services

- Constant Contact
- MailChimp
- List Servers

The logo for Constant Contact, featuring the text "Constant Contact" in a white sans-serif font on a green rectangular background, with a small white grid icon to the right.

Constant Contact

The logo for MailChimp, featuring the text "MailChimp" in a white cursive font on a grey rectangular background.

MailChimp

E-Mail Automation Services

- Marketing Automation
- Self managing e-mail lists
- Templates
- Reporting

Online Meeting/Support Services

- WebEx
- GotoMeeting, GotoAssist, GotoWebinar
- Zoom
- LogMeIn
- QuickAssist (Microsoft)



Online Meeting/Support Services

- Centralized Arbitration Server
- Interfaces with other online software (calendars, accounting)
- Includes a variety of features (voice, remote control, monitoring)
- Reporting/Recording

Shared File Services

- G-Docs
- OneDrive
- SharePoint
- iCloud
- Online Backup Services



Shared File Services

- Remote storage allows secure access from multiple users/locations
- Consistency is enforced by the service
- Online backup services are available to compensate for corruption issues
- Auditing/Reporting

WEC Robotic Consulting

- New division of Software Synergistics.
- Primary focus is helping customers install and utilize robotics in their businesses.
- Primarily focused on services related to manufacturing robots

Business Development Plan

- Form alliance with AMC Robotics.
- Use existing alliances with other (non robotic) suppliers to get prospects.
- In six months:
 - Find 25 prospects.
 - Make five proposals.
 - Close one deal.

Marketing Development - 6 Month Plan

- Build/obtain 1000 contact e-mail list for newsletter.
- Build website to hold technical papers on installing robotic information.
- Produce and deliver 2 newsletters per month on topical subjects
- Produce three webinars on the topic.

Scoreboard

- Became a AMC Robotics Partner.
- AMC gave WEC 100 active prospects for target audience.
- Attended a trade show with a industry tool supplier and got another 100 leads from them. Also found five leads at the show.
- Purchased e-mail list of 500 contacts

Attack Plan

- Immediately target specific e-mails to AMC's 100 contact list.
- Next targeted e-mail campaign to tool supplier's list.
- Generate first newsletter, send to AMC's, tool supplier's, and the purchased list. Include invitation to webinar.
- Give webinar
- Personal follow-up with each webinar attendee.

RR Dune Buggy

- Interested in a robot that can drill and thread holes in their assembled frames.
- They would want help installing, configuring and initial programming of the robot.
- Also interested in future robots to weld and place parts on the frame.
- They also want the robot to communicate with their ERP system.



RR Sales Plan

- Schedule online meeting to discover RR's needs.
- Work with AMC to get the right product for RR's needs.
- Schedule 2nd online meeting with RR and AMC.
- Contact ERP vendor regarding interface
- Schedule 3rd online meeting with RR and ERP vendor.
- Schedule onsite visit with AMC
- Sign agreement with RR for services
- Install robot

Drill Master 1000

- AMC has a family of robots that will do what RR wants for the 1st stage of the project and future stages.
- AMC will carry paper for the sale and will provide onsite installation support.
- Partner agreement with AMC allows WEC to be trained on the products before installation.
- RR visits another manufacturer to see the DM in action and they sign with AMC and WEC



RR Installation Plan

- WEC sets up a shared file site for the 1st phase of the project.
- Site is used to document entire process.
- E-mails are captured
- Gantt Charts published
- Construction diagrams are published
- All critical online meetings are archived
- Status section is updated by all participants

WEC Follow-up

- Cash commission check from AMC Robotics
- Cash final payment check from RR Dune Buggy
- Schedule online meeting to schedule RR's phase 2
- Start calling prospects from last weeks webinar



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