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 complier
- 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
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 programing 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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