



eWay-CRM Simplifies Business Processes at MBK Consulting

High-quality software offers plenty of opportunities to automate and simplify business processes. MBK Consulting is always looking for ways to streamline its business. Get inspired and see how eWay-CRM allows them to automate, simplify and manage their organization's growth.

MBK Consulting has been in business for over 30 years and has expanded considerably during that time. The company now provides training and consulting services to more clients than ever before, so it's much more difficult to maintain control over the process of acquiring new customers, managing training, and managing consulting projects and payments.



“

I can't imagine going back to writing down who called me, what they wanted, and sending myself emails with notes from meetings and appointments so I wouldn't forget to create and send an offer.

Petra Cisarova,
COO at MBK Consulting

Before eWay-CRM, they mainly used an internally created database in Microsoft Access along with a large number of Excel spreadsheets. This led to problems with sharing and tracking information, as well as unnecessary data overwriting.

MBK Consulting searched for a system to manage its processes and eventually chose eWay-CRM. After carefully considering the criteria and then setting up eWay-CRM according to those guidelines, Petra Cisarova managed to simplify MBK's entire workflow from start to finish.

How to fill classrooms with eWay-CRM

MBK Consulting uses their website and the Marketing module in eWay-CRM to reach out to potential clients. They send out news on legislation, consulting, etc., or marketing events such as Christmas discounts.

They moved their email campaigns to eWay-CRM instead of the original Mailchimp, and having marketing and contacts in one app proved to be convenient for several reasons:

- Email campaigns can be created directly in Microsoft Outlook.
- Importing or exporting contacts is not necessary in the eWay-CRM as they are already there.
- Employees can easily access campaign responses and respond directly to them.
- Alternatively, they can send follow-up campaigns based on the responses.
- Any parameters can be monitored for contacts in eWay-CRM. Campaigns can therefore target specific industries, territories, the role of the person in the company, or previous clients who have already completed a course.
- The administration of the personal data of the contacts in eWay-CRM complies



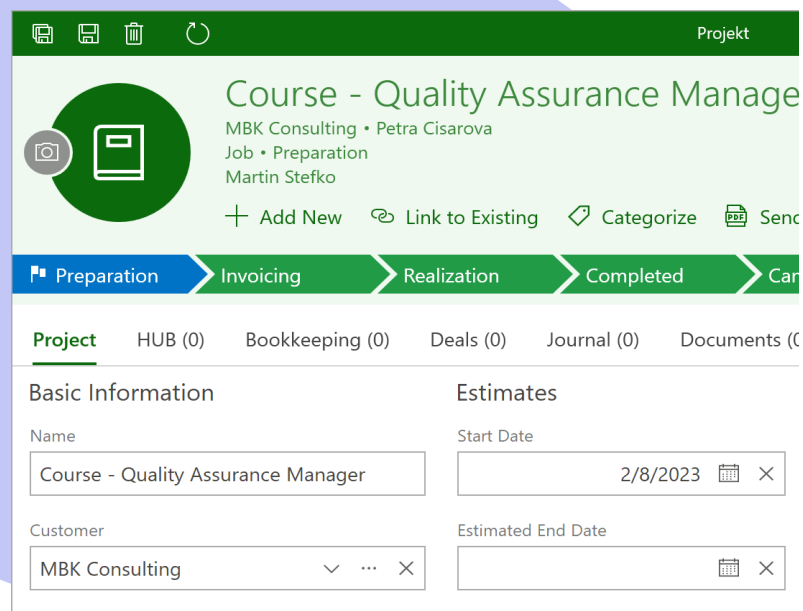
As we are a consultancy, we needed the new CRM to be GDPR compliant. If someone asks to be removed from the recipient list, we have solved the data anonymization in eWay-CRM.



**Petra Cisarova,
COO at MBK Consulting**

Perfect control over the progress of projects

When a course on the website sells out, it automatically becomes a project in eWay-CRM. MBK Consulting has set up custom names for each stage of the workflow, so people can see at a glance what stage the project is in and filter the projects list more easily.



The screenshot shows a project management interface for a course. The title is "Course - Quality Assurance Manager" with a green circular icon. Below the title, it lists "MBK Consulting • Petra Cisarova" and "Job • Preparation" with "Martin Stefko" as the contact. Action buttons include "Add New", "Link to Existing", "Categorize", and "Send". A progress bar shows stages: Preparation (active), Invoicing, Realization, Completed, and Cancelled. Below the progress bar, there are tabs for "Project", "HUB (0)", "Bookkeeping (0)", "Deals (0)", "Journal (0)", and "Documents (0)". The "Project" tab is selected, showing "Basic Information" and "Estimates" sections. The "Basic Information" section includes fields for "Name" (Course - Quality Assurance Manager) and "Customer" (MBK Consulting). The "Estimates" section includes fields for "Start Date" (2/8/2023) and "Estimated End Date".

MBK Consulting employees are freed from the headache of tracking and forwarding communications, information, and documents related to their projects. It's convenient that they can always see all the details of the course participants and which courses each participant has already attended.

Once the course is over, the project manager can check that invoices have been paid and issue certificates to participants. Certificates are created dynamically. When participants pass their training, MBK Consulting generates and emails them a certificate automatically – no need for manual input from staff. Previously MBK Consulting used to create certificates manually which took up valuable time with large numbers of participants.

Plenty of time saved for key employees

When we asked what the biggest benefit of eWay-CRM was for MBK Consulting, it was primarily saving time and simplifying the company's administration and eliminating the constant emailing between colleagues. No wonder. MBK Consulting team is relatively small, but it provides support to many lecturers, so every minute counts.

Ms Cisarova, as COO, was unhappy with the amount of time and effort that went into rewriting data into several different fields. Even worse, Ms. Cisarova was the only member of the team that knew how to extract and filter the data from Access and work with it. Fortunately, eWay-CRM has changed all that and helped MBK Consulting set up an efficient way of sharing information.



“

When someone calls and introduces themselves, I look up the contact in Way-CRM and immediately have all the information I need about the client. The conversation then goes much smoother. Information is our most valuable commodity across the board.

**Petra Cisarova,
COO at MBK Consulting**