

Membership Based Business Trades Complex Excel Spreadsheet for Simple P2xRM System to Securely Manage Subscriptions and Customer



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- Anya Ciecierski, Co-owner of ERP Blog LLC

ERP Blog LLC provides monthly subscriptions and services to approximately 200 companies that are members of three group blog sites related to the ERP/CRM industry.

The Challenge

When the blog sites began in 2009, it was easy to manage the details of the few subscribers in an Excel spreadsheet. As the popularity of the sites grew, more members were added, and additional services were offered. The Excel spreadsheet grew into a massive, complicated document with additional client data kept in other, disconnected systems. Everything had to be updated in multiple locations by multiple people. When a client asked a question, there was never one place that had all the information.

The owners looked into CRM solutions, but as a very small business, they felt the options were too complicated and too expensive. They wanted a simple CRM system that was secure and affordable, and yet wholly customized to the way they wanted to work. Since this seemed impossible, they continued to limp along with Excel.

The Solution

During their research, the owners liked the [online overview of P2xRM](#) from [P2 Automation](#), but assumed it would be too expensive. When they finally asked for more information, they realized it was well within their budget and more affordable than other systems they had been evaluating.

The Benefits

Anya Ciecierski, co-owner of ERP Blog LLC, explains how P2xRM has changed the way she works:

Shared access to information

“In the past, I was nervous about sharing my fancy Excel spreadsheet with anyone, even my business partner, for fear that it would get corrupted. I kept the master version for myself and saved backup copies to a shared folder for the rest of my team. Of course, this was inefficient. Now, multiple people can access P2xRM, so we all have the same information quickly.”

Secure client data

“I know that my data in P2xRM is safe. I will not lose the information that is essential to run my business, and I don’t have to worry that the personal details of my clients will be compromised. At first, I balked at the idea of using Duo Authentication to access P2xRM online, but I quickly realized it is completely painless.”



Steve and his team have always made me feel that they are willing to do whatever it takes to make me happy, even when I change my mind. I wish every relationship in life was that easy.

- Anya Ciecierski,
Co-owner of ERP Blog LLC

Double-entry eliminated

“Before P2xRM, information had to be entered in multiple systems. When we found discrepancies, we wasted time figuring out which version was correct. Often we didn’t track things that would have helped our business, because it was simply too much trouble. Now, we know we have current information in one place. Because the P2xRM system is so flexible, we can ask P2 Automation to add fields or change screens when we realize we want to track something new.”

Complete view of customers

“In the past, when one of our members asked a question about their subscription, we had to look in multiple systems to find the answer. Now, I can quickly see all the data on one screen. This took our response time from several hours to just a few minutes. I feel so much more confident speaking with clients, knowing I can see the complete picture of their account.”

Added to valuation

“If we ever want to sell our company, having the right technology already in place adds value. We have taken our

small business to a more professional level. Going forward, P2 Automation will help us set up new workflows, email automation, and reporting, which will make us even more efficient.”

Zero learning curve

“I will admit the change was a bit painful initially. I missed my Excel spreadsheet that I was so comfortable with. However, after just a few months of using P2xRM, I can’t imagine ever going back to Excel, and it’s hard to believe I limped along with that system for so long. It took less than an hour for me to learn how to use P2xRM, and nobody on our team has ever found it difficult to use.”

Easily customizable

“The best part about the P2xRM system is that it is completely custom. All I have to do is tell Steve, “It would be great if we could do this,” and he makes it happen. I don’t think he has ever told me it couldn’t be done. Steve and his team have always made me feel that they are willing to do whatever it takes to make me happy, even when I change my mind. I wish every relationship in life was that easy.”

ERP Blog LLC now has a simple, no-frills CRM system that exactly fits their small business.

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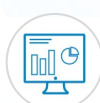
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