



YOU PAID WHAT? FOR A GLORIFIED ROLODEX?

HOW TO MAKE YOUR CRM/SALES SYSTEM A REAL MANAGEMENT TOOL

Presented by **GENE MARKS**



Not happy with your Customer Relationship Management system? Sitting on a glorified roloDEX? Investigating a new or replacement system?

This presentation will discuss how to turn your CRM system—whether you own or you’re researching—into a productive sales and service management tool including:

- ✓ Key reports you should be using to manage your team;
- ✓ How to get your sales and service staff to use the system;
- ✓ Ways to make sure your data stays accurate;
- ✓ Creating and managing an effective lead management pipeline;
- ✓ Making sure nothing falls through the cracks;
- ✓ Effectively partnering with your marketing team;
- ✓ Which popular CRM systems are right for your business?
- ✓ How can you determine the ROI of a CRM investment?
- ✓ The most popular add-ons to make a CRM system effective;
- ✓ The future of CRM: trends to consider for 2021 and beyond.

It doesn’t matter what CRM system you’re using or if you’re still researching. You’ll learn enough to better understand how to choose the right for your company and how to ensure that it’s used effectively and profitably.

“Our group loved you last year. You got the highest score of any speaker.”



David Perry, Executive Editor
Furniture Today

“We got some preliminary results back from our follow-up survey, and Gene was our top ranked speaker. He did a great job, the content was highly accessible, and he was really nice to work with”



Dan Marx, Director of Content Development
Specialty Graphic Imaging Association

Gene’s presentations help business owners and managers of all industries to look ahead, with specific actions for growing and profiting based on the strategies of other business owners in their industry.

Book Gene for your keynote or breakout session



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See Gene in Action www.GeneMarks.com



GENE MARKS

AUTHOR. COLUMNIST. KEYNOTE SPEAKER. BUSINESS EXPERT.

The New York Times The Washington Post
THE HILL The Philadelphia Inquirer Forbes Entrepreneur.com The Guardian

A past columnist for both The New York Times and The Washington Post, Gene now writes regularly for The Hill, The Philadelphia Inquirer, Forbes, Inc. Magazine, Entrepreneur Magazine and The Guardian.

Gene has written 5 books on business management, specifically geared towards small and medium sized companies. His most recent is *Want More Cash?: 100+ Ideas And Strategies For Increasing Your Company's Cash Flow This Year*.

Nationally, Gene appears regularly on Fox Business, MSNBC, as well as CBS Eye on the World with John Batchelor and SiriusXM's Wharton Business Channel where he talks about the financial, economic and technology issues that affect business leaders today.

Through his keynotes and breakout sessions, Gene helps business owners, executives and managers understand the political, economic and technological trends that will affect their companies and—most importantly—the actions they can take to continue to grow and profit.

Gene owns and operates the Marks Group PC, a highly successful ten-person firm that provides technology and consulting services to small and medium sized businesses.

Prior to starting the Marks Group PC Gene, a Certified Public Accountant, spent nine years in the entrepreneurial services arm of the international consulting firm KPMG in Philadelphia where he was a Senior Manager.

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Gene was a huge hit. I commented “what a way to close the conference.”
Lynn Smith, Manager of Meetings, The American Foundry Society (AFS)

Our group enjoyed Gene—his was the highest rated presentation at PEMA’s Annual Meeting.
Susan A. Denston, QAS, Executive Director, Process Equipment Manufacturers’ Association

Gene, hands down one of my favorite things last week at the WWEMA conference was your presentation. When you get a chance can you forward your presentation to me.

Rich Cavagnaro, President & CEO, AdEdge Water Technologies/Water & Wastewater Equipment Manufacturer’s Association

