

## THE BUILDING VALUE SERIES

Strategies For  
Business Owners  
and Managers of  
ALL Ages To Build  
And Grow A High  
Value Company

## BUILDING VALUE: CRM 2023

The latest customer relationship management software and the best practices to use this critical application to build value.

Presented by **GENE MARKS**



## Thinking of getting a customer relationship management (CRM) application for your company? Already have one and want to know how to use it better?

Please join Forbes CRM columnist, author and CRM expert Gene Marks CPA to discuss all you need to know about CRM applications in 2023. **During this presentation, Gene will cover the following topics:**

- ✓ A comparison of the top CRM applications for small and medium sized companies along with pricing, pros and cons
- ✓ Where to find them and how to evaluate these applications.
- ✓ How can you determine the ROI of a CRM investment
- ✓ Thoughts on how to maximize these applications for their best use in your company.
- ✓ The most popular add-ons to make a CRM system effective
- ✓ The future of CRM: trends to consider for 2023 and beyond
- ✓ Other tips and best practices to consider before buying.

GENE  
**MARKS**

**AUTHOR. COLUMNIST.  
KEYNOTE SPEAKER.  
BUSINESS ADVISOR.**



**Forbes**  
**The Guardian**



**The Washington Post**

**The Philadelphia Inquirer**

**The New York Times**

**Entrepreneur.com**

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](http://www.GeneMarks.com)**

# GENE MARKS

**AUTHOR. COLUMNIST. KEYNOTE SPEAKER. BUSINESS ADVISOR.**

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.

Gene also hosts two very popular podcasts: Thrive, sponsored by Paychex; and Small Biz Ahead, sponsored by The Hartford Insurance.

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## TESTIMONIALS

👍 "Good morning, Gene, Without a doubt, your presentation was the best closing session I have ever attended. I know you are doing the kickoff for Symposium and I'm sure I will be saying the same for the kickoff session. Somehow, you managed to make all the tough news entertaining. It was a master class on presenting." — *Lewis Linda Dodd, Learning Specialist, North Carolina Association of CPAs*

👍 "In a word.... WOW! Gene absolutely delivered. He was spot on for our small business members. He packed a lot into 45 minutes and left everyone with something to take away. People were taking pictures of his slides during his presentation. The conversations about his keynote continued throughout the day. People said they emailed him right after he got off stage. Others mentioned that they were emailing their own accountants to find out if the advice he was giving could help them. They found out that they were entitled to tax relief or grants that would basically offset their price of attending our show. That is a tremendous value for our members. We could not be happier. He was fantastic." — *Mike Adamson, President & CEO The Aircraft Electronics Association*

👍 "Gene, I would say in my 30 years of attending presentations, yours was THE MOST: valuable, relevant, properly paced, perfect amount of info; not too much, but enough, excellent humor, and perfectly executed presentation I have experienced." — *Jill Keim, VP Relationship Manager, First Merchants Bank*

👍 "Gene was a huge hit again. We have never brought a speaker in back to back years. Gene certainly was worthy and delivered again!" — *Kevin Gilbride, Executive Director, The Accredited Snow Contractors Association*