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NEW BUSINESS MINNESOTA



Special Report

Resource Heroes

New Entrepreneurs Often Need the Resources of Key Business Professionals to Succeed. New Business Minnesota Brings You Stories About **Resource Heroes** You Should Know and How They Helped Clients Reach Their Goals: **Jill Gibson**, Softech Solutions (Far Left) with client Bernie Schwab, Spruce Valley Payroll and Services; **Chad Peterson and Gene Grugal**, Integrated Business Solutions, with client Kristina Newell, The Trinity Business Group.

Resource Heroes

Nobody
Succeeds in Business
Alone, Especially Not New
Businesses. They Often Rely on
Professionals with Specific Skills or
Services They Need to Launch and
Grow Their Enterprises. They Turn
to Their **Resource Heroes:**
Business Professionals Who Have
Made a Significant Difference In
the Success of Their Clients.
Here We Present Two Such
Examples.

RESOURCE HERO



Chad Peterson and Gene Grugal of Integrated Business Solutions Inc. and their client, Kristina Newell of The Trinity Business Group.

Integrated Business Solutions Inc.

Providing a Comprehensive Marketing Support to Help a Small Business Grow to the Next Level

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Chad Peterson and Gene Grugal of Integrated Business Solutions take business relationships seriously. In fact, that is a key reason for the growth in their business and a major part of their business model.

Their company offers marketing and design, IT, recruiting, accounting and tax services to relieve entrepreneurs of those burdens so they can focus their time on what they do best.

“When small business owners come to us for help, it is usually because they have reached a point where they can no longer handle it alone or they don’t know how to grow to the next level,” says Chad, who handles the marketing and creative side of the partnership.

“Some don’t know how to market themselves. Some do a good job with sales, but not with accounting,” says Gene, the accounting and tax side of the company. “Like many new and small business owners, they find they can’t do it all by themselves.”

Integrated Business Solutions’ model is to become a trusted advisor for clients. They may come in for tax help, but as the trust grows, they find they also need help with marketing or another area for the business.

Long-time best friends, Chad and Gene decided to start the business when they realized they were already doing it on a small scale for clients as well as themselves.

“The first tax season of my stand-alone practice, I put together my mar-

keting ad for the year on a Friday in January,” says Gene. “Chad said it sucked and he brought in a new one on Monday that was 1,000 times better than what I contemplated. I decided to focus on what I do best after that.”

That story captures the spirit of their tag line, “Wear One Hat.”

“We live by that tag line ourselves and know how beneficial it has been for us. And that’s what we do for our clients as well.”

“If a service we don’t offer is needed by a client, we find the right source. We pride ourselves on a strong network of referral partners who will treat them like we would. If we’re not the right fit, we’re pretty good at finding them a solution.”

“We find that trust in one area extends to other areas of our company,” says Gene. “We get to know the client and understand their needs. It makes it easier to bring them to other departments to meet new challenges.”

Gene says it’s easy for clients to stay with Integrated Business Solutions services. They don’t have to retell their story. The groundwork is already laid and the trust is already established.

The Value of Trust

Kristina Newell, founder and president of The Trinity Business Group wasn’t looking for help in marketing her business when she bought her precious 10-year-old son Jake the birthday present he requested.

She just wanted to get Jake the logo he longed for. Jake is a huge fan of the Ironman movie series and greatly admired Tony Stark, of Stark Industries.

“He’s my little entrepreneur,” says Kristina. “He designs inventions he

Integrated Business Solutions Inc.

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wants to make, like Stark industries. He says he wants to make the world a better place. That's why he needed a logo for Harp Companies."

She turned to Chad, whom she had met at a Shakopee Chamber of Commerce networking group, and asked if he could help with the logo. She got more than that.

Chad and Gene took the Harp Companies assignment seriously, says Kristina.

"They took time to meet with Jake on a Saturday and treated him like a real client, not a kid. I just let them talk to Jake," she says. "They listened to him describe his business goals and ambitions and created a logo for him that he just loved.

As a bonus, Gene and Chad also registered Jake's business with federal and state agencies and started the process in getting him his first trademark as well.

"Watching them spend the time with Jake and seeing how they took care of him, I knew I wanted to work with someone who would treat me that way, too. That's when I decided to ramp up on my marketing."

That's where the business relationship began between Integrated Business Solutions and The Trinity Business Group.

Kristina provides coaching services to individual executive leaders, emerging leaders, ad hoc or focus coaching and group or team coaching. The word "Trinity" in the name emphasizes the synergy that must exist between a company, its teams and the individuals who work there.

Her business was doing well, but she needed a more formalized marketing plan to grow in 2016.

"When I didn't have clients, marketing was easy," says Kristina, who has marketing experience in her past. "But when I got more clients and life happens, there just wasn't time."

For the past year and half she hadn't done much formal marketing; not a mailer not a tradeshow. "By the end of last year, I needed to do something to generate more business, meeting with Chad and Gene was fortuitous."

The first step was for Chad and Gene to learn about Kristina's business and do an assessment of her needs and identify what they could provide her from their four service divisions:

Marketing and Design, including branding, advertising, website design, SEO, graphic design and target marketing.

IT Solutions, such as cloud-based software support and service, integration of customer relations management (CRM) software, business system integration, and eliminate data entry redundancies where possible.

Recruiting support to help clients identify job requirements, review resumes, qualify candidates and streamline the hiring process so the employer can focus on core competencies.

Accounting and Tax services in addition to payroll, and CFO services as needed, such as when preparing financials needed for a loan or a line of credit.

Often times, accounting is one of the more pressings needs, says Gene. "Sole proprietors are focused on day-to-day activities and may not even pay attention to bookkeeping or accounting," he says. Those people come in with a shoebox or electronic file nightmare just before tax day.

In his opinion, the only time accounting is done well is if it's done by someone other than the driving force behind the business.

"I can provide as much or as little help as they need. My goal is to make it so they aren't a danger to themselves," says Gene. "I review their books every month to catch problems as they arise."

Kristina's situation was different. She was doing a good job of managing her books and financials and didn't need help at this time, though that may

change as her business grows.

Her biggest initial concern was marketing.

"She wanted us to take over her web site and hosting," says Chad. "To save money, Kristina had used GoDaddy to build her site, which means they owned it.

"Doing an overhaul that she would own would require starting over from scratch. Since it was performing adequately, we recommended not making an investment there until it needs a redesign."

Then they looked at her marketing materials. Because of Kristina's marketing background, Chad said there some very good flyers, trifolds and business cards that she had created on her own.

"We don't just want to just spend her money," says Chad. "We told her what to keep and where we could help."

What was most needed was an executable marketing plan scheduled throughout the year.

After reviewing what did and didn't work in the past – trade shows, some gimmicks and giveaways didn't produce – they are focusing on a mix of post card mailers tied in with online campaigns.

"It's important we take into account who the target market is and how they receive their information. Then we can identify the best way to get them," says Chad. "There is no one way to market, otherwise everyone would do it. We do multiple approaches – online, direct mail, etc. – to find what works.

The goal is to boost her response rates early in the New Year when people are setting goals and could use her coaching services, says Chad. Her goal is to pick up five to 10 new clients in 2016.

Kristina says Chad spent a lot of time researching her past efforts to establish a benchmark. "They made a formal presentation about what I needed and some ideas of what could be done within my budget."

It was not a one-and-done thing, she says, but a plan with deadlines. For each monthly campaign, Chad created the graphic pieces and scheduled each step. Each postcard or online effort is being tracked so they can measure the results and make adjustments as needed.

"I understand the marketing side well, but the process of going from idea, to create the piece and getting it out in front of other customers was more than I could handle," Kristina says

"Integrated Business Solutions are Resource Heroes – life savers – as far as I'm concerned, for taking what I envision over the next few years and helping me build a plan to get there," says Kristina.

As her business grows, she plans on taking advantage of the relationship they've built together and use their accounting and recruiting service for her first hire.

"When she came to us, she had a need to Wear One Hat. Because our services are very a la carte, we can support what she does now and in the next stage of her company's growth," says Gene.

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Chad Peterson is vice president of marketing and Gene Grugal is vice president of accounting and tax with Integrated Business Solutions Inc. – Wear One Hat™, a business based on four key divisions – Marketing and Design, IT, Recruiting, Accounting and Tax. They help other small and medium sized businesses and entrepreneurs to focus on what they do best and Wear One Hat™. Chad can be reached at (952) 855-4520 or chad@wearonehat.com. Gene can be reached at (952) 855-4520 or gene@wearonehat.com

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Call To Action

For a free consultation with Integrated Business Solutions and a review of your business needs and goals, call (952) 855-4520 or email your request to Info@wearonehat.com

RESOURCE HERO



Jill Gibson Blyth, president of Softech Solutions LLC, and Bernie Schwab, president of Spruce Valley Payroll and Services.

Softech Solutions LLC

Bringing Structure, Increase Marketing Opportunities and Improved Customer Service to a Growing Payroll Company

New Business Minnesota

This is how business relationships work. Jill Gibson Blyth and Bernie Schwab have been part of the same networking chapter for years. Each has heard the other's presentations multiple times. And they turn to each other when they need help.

Three years ago Jill's company, Softech Solutions, was adding employees and needed payroll; she turned to Bernie's company, Spruce Valley Payroll and Services.

And this year, Spruce Valley was growing so much that Bernie needed a better way to manage his customer and sales contacts. He called on Jill for help.

At the heart of Bernie's problem was lack of a Customer Relations Management (CRM) tool. "I was using spreadsheets and Outlook. It worked when we were small," says Bernie. "I had met thousands of people over the years and I didn't have a comprehensive way of tracking who they were, when we met, what was the last contact, or what was the context.

"I have walked into networking meetings and had people give me a hug. I didn't know who they were. They had to introduce themselves to me," says Bernie.

Softech Solutions specializes in integrating Sage ACT!, a leading contact management software, with the sales process of businesses she consults with. Many companies today have tons of isolated data that are used in one part of the business, but not in another.

Jill looks for ways to make data productive, to drive sales, create targeted marketing programs and keep the sales funnel full.

The first step was for Jill to meet with Bernie and talk about how he operated, the steps in his current sales process, how he follows up on leads and how he interacts with clients.

Bernie's needs were pretty straightforward," she says. "He was extremely busy and he needed to keep it all going forward without it taking up all his time."

In addition to selling payroll services, the company, naturally, has to deliver those services. That brings Bernie's partner, Terry Johnson, into the picture. Her biggest challenge is managing customer service and the complex calendar of payroll schedules for hundreds of companies.

"We are totally relationship based," says Bernie. "I want to know customers and prospects by first names. I want to be able to understand what is happening on the production side so I can make sure those relationships are in good order. And because we are heavy into

Softech Solutions *Continued from Previous Page*

referrals, I need to track who needs an accountant, banker or other services”

Working with Softech Solutions was just what Bernie needed. “My background was IT for 20 years, serving Fortune 1000 businesses, and I understand data issues, accessibility, integration and business process tools,” Bernie says.

“Jill also comes from a background of process-driven software and she understands marketing. She is not your typical tech weenie.”

More common, he says, are tech people who only understand the technology part. They don’t get the business process and how marketing works.

“Marketing, social media, sales, branding, extending your reach to your targeted community; Jill understands all those facets. It increases her credibility in the marketplace,” says Bernie.

By focusing on process so heavily, Jill says the applications she recommends will almost pick themselves.

As a master networker, Bernie collects mountains of business cards. Bernie needed to harness that raw data and add to it meaningful information, schedule calls, follow up meetings, track history and notes on encounters.

“With good information in your database, you can call a contact and say, ‘Three months ago you told me to call after the event,’” says Jill. “When you make calls like that it kind of blows their minds. We want to know where leads and potential customers come from. How are they marketed to?”

To accomplish that, she designed a Sage ACT! database with custom fields to support how Bernie does business. She also integrated Outlook with Sage ACT! so his emails are tracked along with other customer contact events.

The solution she is designing for Spruce Valley will be done in phases to ensure that each component is used and mastered before bringing in the next one.

“I present a complete vision so they can see what I’m trying to do,” says Jill. “There are always benefits for what I do, but there will also be the impact of a learning curve. Too much too fast can be overwhelming. There is a lot of change, so I take a managed approach. I want them to master phase one and get training. Phase two will be added when it no longer feels like the new system.”

The success rate on adoption is much higher when it goes at the client’s speed. She has seen many companies spend a fortune building a complex system only to introduce it to users with a mere two hours of training.

Phase one for Bernie was to get Sage ACT! fully integrated with

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“Like” Softech Solutions LLC on Facebook and learn about upcoming promotions, software discounts, webinars, and events!

Outlook and start using it right away. It’s set up so that he can begin syncing with his smartphone when he is ready. She also set up mini dashboards to track his sales results so he can see, overall, where he is in the sales process.

An important next step will be helping Terry manage the payroll production calendar. The Spruce Valley team has looked at various calendar programs, but they lacked the flexibility Terry needed. They were considering hiring a programmer to build a program from scratch. Very expensive. Then they talked to Jill.

“For Terry, I recommended Lotus Notes to help her stay on top of deadlines,” says Jill. Lotus is great for adding exceptions and rules. If payroll is on a Sunday or holiday, it automatically rolls it over to the day before or after based on the rules you set up.

Bernie says Jill is the first one to come up with a calendar solution. “We’ve been looking for a year on our own. This will work.”

The game changer in the process will be bringing a marketing structure into the process. Social media will be integrated into the process so Bernie can interact with clients through Facebook, LinkedIn, Twitter and with email.

Sage ACT! will be used for email campaigns that can be scheduled in advance to share payroll-related content, promote special events and send out other information that is appropriate to them.

“I’ll be able to see if the email has been read and how they responded,” says Bernie. “Sage ACT! can track it all so that I can send follow-up emails only to those who opened the initial email so I don’t overuse the privilege. But if I have something I need to say, I can get it to the right person.”

By the time it’s over, Softech Solutions will have set up a comprehensive system, ultimately integrating with QuickBooks, so that Spruce Valley will achieve its goals of improved marketing and service to its clients.

Before they began working together, Bernie and Jill were friends with many shared clients. “Now,” says Bernie, “she is a trusted advisor.”

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