



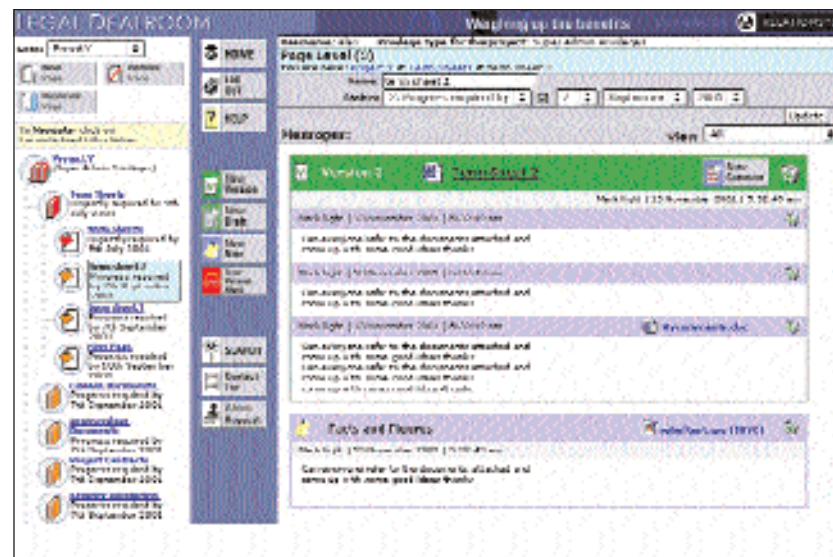
# speakup

9th Edition Summer 2002



GPB Consulting is often involved in the production of files such as speeches, annual reports, PowerPoint slides and pitch documents. Prior to this system becoming available we had a logistical nightmare in feeding out each draft to teams of principles and advisers for input. These would arrive back at different times and often contradict each other. We were 'piggy in the middle'. The disorganisation also cost clients money. Now, the inputs are co-ordinated and can be tracked. Sorted.

**Alex Ang & Ewan Pearson**



To try a RelationSys Deal-Room for a project, contact Sarah Cottam at **GPB Consulting**. (020 7831 1000, s.cottam@gpbuk.com). You can also get more information on Deal-Room from [www.relationsys.com](http://www.relationsys.com)

## Open Courses with Industrial Society Learning & Development

*These courses are a good opportunity for individuals who need coaching and would benefit from being in a group with people outside their organisation.*

### Advanced Presentation Skills

*This senior level workshop is designed to help participants improve their style and method of presentation. This is a two-day course followed by an on-line 'Virtual Refresher'.*  
2002: September 11-12, October 3-4, November 4-5, December 3-4

### Pitching to Win

*This senior level course is designed to help participants to win more of the business pitches they do – a higher 'hit rate' so that their organisations generate increased revenues. This is a three-day course.*  
2002: September 2-4, November 26-28

**Please call us on 020 7831 1000 for further information or to book someone on a course.**

## GPB Consulting: Our Services

We are a leading European Consultancy with Associates around the world. We specialise in the spoken communication areas of presentation, selling, negotiation, media and telephone skills. Our principle focus is assisting top to middle management in these areas. We offer our advice both as consultants on important business issues, and as trainers in general skills development.

We work both one to one with top management and with group workshops for middle management.

Workshops run for between one and five days, and are tailored to each client's requirements.

*Our philosophy is simple: "For you to be yourself at your best, even in the toughest situations".*

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## Contents

### PRM & CRM

Most of us are aware of CRM (Client Relationship Management) as it was the business trend of the nineties, covering front pages of the majority of business magazines. However, have you heard of PRM? Ewan Pearson introduces you to Prospect Relationship Management and the link between CRM & PRM.

### "SORT YOURSELVES OUT UP THERE"

Handling working documents between many individuals, all valued for their input invariably becomes a logistical nightmare, much like Wallace balancing sheep up a ladder whilst speeding along on his motorbike. We think we've found an excellent solution, in the form of an on-line Deal-Room.



# PRM & CRM

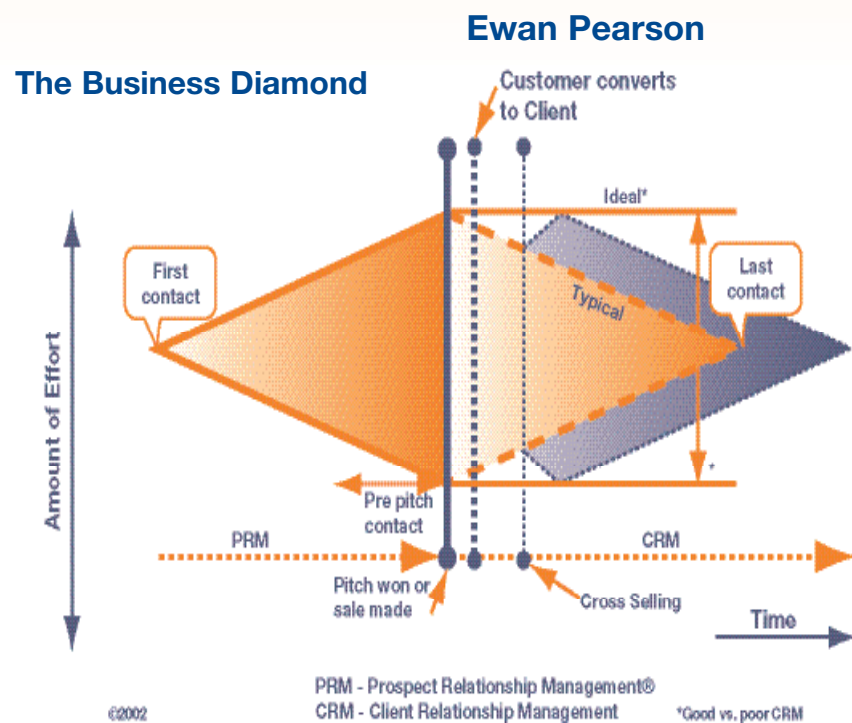
**CRM, or Client Relationship Management, has been the trendy TLA (three letter acronym) of the nineties. Businesses strive for better relations with customers in order to retain them and win from their competitors. Firms have tried using IT which in most cases causes CDP – Customer Disservice Problems; It seems to us that IT is more about saving money than improving CRM. Just call a customer service centre, time the wait whilst you make a coffee or go out for lunch then try to call customer complaints! Clearly CRM still needs to improve in many ‘customer-focussed businesses’!**

But what about ‘prospects’ – those people and businesses that have not yet become customers or clients? Strangely businesses treat prospects much better than their own customers, in spite of the hackneyed cliché that it is five times as difficult (read costly) to acquire new customers than to keep existing ones!

Our specialities include the skills of selling and managing client relationships. As a result we can offer a rare glimpse at the similarities and differences between selling to and managing clients.

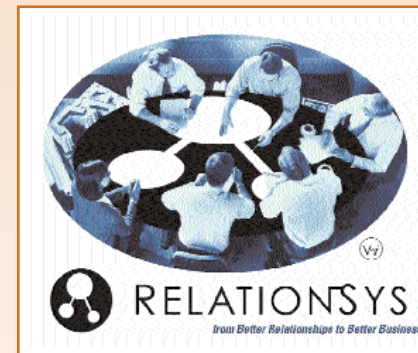
We seek to bring the separate prospecting and customer relationship issues together. Where you have CRM we have added PRM or Prospect Relationship Management, and have linked them on the diagram you see here.

Whilst most advisers do not link PRM to CRM, we do, because a customer or client would do. If you are a business or individual looking to buy something (say legal or accounting services), you get a certain treatment during the PRM phase. You would expect and indeed demand that you get the same or better treatment during the CRM phase. We call this the ‘Clients Rights Act’. After all you are now worth something to your supplier rather than being a business development/sales cost.



Our diamond diagram shows a sad truth: that over time the effort put into clients and customers tend to diminish until the supplier is fired. Businesses should not rely on inertia to prevent customers leaving, positive effort should at least be maintained over time – the ideal (solid) line on the diamond.

# “Sort yourselves out up there”



E-mail is an amazing communications tool, but not without its limits. For many businesses the limit is a combination of adjusting the system to match work practices, and resolving issues of security, multiplication of and disorganisation data (when copying a message or document to several colleagues) and tracking the multiple replies that come back.

Increasingly, many businesses are turning to online Deal-Rooms, which have all the speed and flexibility of email, with none of its inherent problems.

## What are online Deal-Rooms?

A Deal-Room is in effect a secure website with tailor-made pages where authorized members can view and post messages and documents centrally. Deal-Rooms allow users to reach the information at anytime from anywhere.

Deal-Rooms have the strong advantage that those involved in a deal, project or any other matter can view and work on the same set of information. Emails have an

*Our title comes from Nick Park’s film ‘A close shave’. It has a great scene in which sheep are piled up a ladder on top of Wallace on his speeding motor bike. Sometimes managing our clients’ working documents for pitches, results and IPOs feels much the same! We think we’ve found the solution, and it’s not email.*

annoying side effect of duplicating work, and worst still, users often and easily lose track of who has seen what. Deal-Rooms prevent such duplication, and have powerful tracking features built-in. In addition, documents and messages sent to and from a Deal-Room are encrypted and unlike emails cannot be easily read if intercepted. GPB Consulting has linked up with a leading provider of these services, RelationSys, in London.

## An example of Deal-Rooms in action

In a recent rollout of the system, a client needed to share reports regarding progress on a deal with a large team of people based in several cities around the world.

The ‘Administrator’ uploaded each new report into a RelationSys Deal-Room rather than sending an email every time a new report was finished. The RelationSys Deal-Room service provided security codes for all users who needed access. This meant that there was a central collection of reports, everyone was updated at the same time, and all responses to each report bulletin could be viewed in a central location online. Feedback has been extremely positive - the main reaction being the ease of use of the system.

## When to use Deal-Rooms

Here are some points to consider when deciding whether to activate such a Deal-Room for your business matter or project. **The project stakeholders are based in multiple locations.** A Deal-Room will allow all members to gain central access to shared files over the Internet.

**Security for correspondences is important.** RelationSys Deal-Rooms use SSL technology, ensuring that encryption is applied to any files being transferred.

**The length of project will make it difficult to keep track of different documents and tasks:** Deal-Rooms are specifically designed to keep track of this for you.

**The data you will be handling is in a digital format.** Deal-Rooms are ideal for exchanging word documents and Excel spreadsheets. Deal-Rooms will allow you to describe changes in the document as well as their respective version or draft numbers

**Moving a matter or project towards a specific delivery date:** Deal-Rooms can smooth the path towards delivery, and ensure that everyone is aware of important deadlines.

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