

Case Study

Brian Carter Group Streamlining Administrative Processes Administrative, Operational, & Project Support

Project Overview

Brian Carter, is CEO of The Brian Carter Group, a multiple six-figure consultancy with world-class expertise using digital and social marketing and advertising to help their clients drive engagement, traffic, leads and sales. Despite having been in existence for over a decade, with increased success year after year, Brian and his wife were doing everything themselves in the business.

Challenges

Brian was overwhelmed with the onboarding process for new clients, all the overdue invoices from clients, and his backend operations. He needed someone to help him streamline all of the backend processes, onboard his new clients, and manage the day to day operations so he could focus on improving the customer experience and lead generation process to drive revenue and continued growth.

Solution

Utilizing our administrative, operational, and project support services, Gwendolyn did an in-depth assessment of Brian's backend processes, onboarding process, and billing functions to clearly understand the strengths and weaknesses of the business. Gwendolyn then worked with Brian on implementing an electronic CRM system and worked with him to hire additional team members to reduce both his and his wife's workload.

Result

The plan resulted in the implementation of an electronic customer relationship management system that would allow him to do the entire onboarding process from one platform, along with electronically signed contracts, electronic payments, and recurring billing. This new system helped Brian reduce the manual processes he was using to onboard and manage clients and track leads into one system. Using this new system, he was able to manage clients, quickly engage new leads, and process payments all from one place. Our work with Brian resulted in overdue collections being reduced by 70% in 30 days and the remaining 30% collected in 60 days and client onboarding documents to go out within minutes of agreeing to work with the agency.

"Gwendolyn Young is a superstar! Dependable, driven, organized, with a no-nonsense approach to business, but a fun personality. If you need someone to keep everything going or to get everything shipshape in the first place, look no further."

- [Brian Carter](#)