method:CRM CASE STUDY

How Savvy Bird Consulting drives small business growth

Meet Kayla, the owner of Savvy Bird Consulting

Kayla Prusinski is the founder and owner of Savvy Bird Consulting - a Minnesota-based QuickBooks training and accounting firm. An entrepreneur herself, Kayla is dedicated to helping small business owners grow their businesses and take control of their finances.

Three years into running her QuickBooks training and consulting business, Kayla realized she needed a CRM to keep up with the growing demand for her services. She shopped the market, trying out solutions like Salesforce and HubSpot, but found these CRMs didn't meet her day-to-day needs.

For Kayla, Salesforce was simply out of budget as a small business owner and HubSpot, although a freemium solution, didn't offer the level of data privacy she was looking for.

As an Advanced Certified ProAdvisor for QuickBooks Online, Kayla turned to the QuickBooks ecosystem for a CRM solution that would work the way she needed it to. That's when she found Method - the #1 rated QuickBooks CRM on apps.com.

Enter Method:CRM

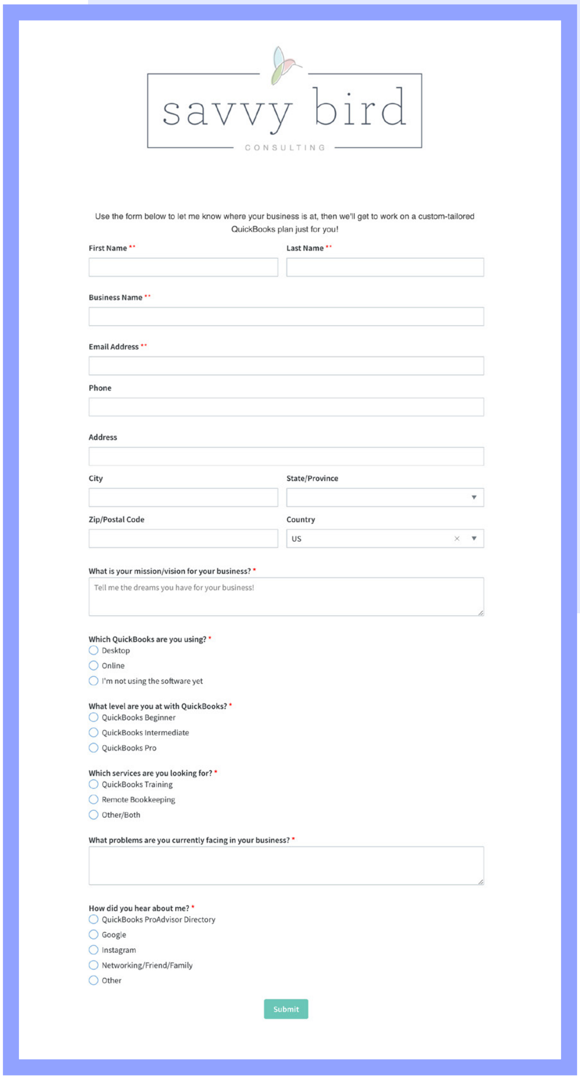
Excited about finding the only CRM with a real-time, two-way QuickBooks sync, Kayla joined the Method:Partner program in October 2019 and has been using Method:CRM ever since.

What Kayla loves about Method:CRM is how easy it makes lead management. Thanks to Method's web to lead form, Kayla can automatically capture website leads who are interested in her QuickBooks training and accounting services.

Plus, with the help of Method's customization services, Kayla was able to create a lead gen form that's on-brand and automatically collects answers to the questions she needs to ask her small business clients, such as:

- What is your vision for your business?
- What level are you at with QuickBooks?
- What services are you looking for?

By gathering this information in advance, Kayla is as prepared as possible for meetings with potential clients. As a result, she saves both her own and her client's time as she can immediately share which of her services are the best fit for them.


savvy bird
CONSULTING

Use the form below to let me know where your business is at, then we'll get to work on a custom-tailored QuickBooks plan just for you!

First Name **
Last Name **
Business Name **
Email Address **
Phone
Address
City
State/Province
Zip/Postal Code
Country
US

What is your mission/vision for your business? *
Tell me the dreams you have for your business!

Which QuickBooks are you using? *
- Desktop
- Online
- I'm not using the software yet

What level are you at with QuickBooks? *
- QuickBooks Beginner
- QuickBooks Intermediate
- QuickBooks Pro

Which services are you looking for? *
- QuickBooks Training
- Remote Bookkeeping
- Other/Both

What problems are you currently facing in your business? *

How did you hear about me? *
- QuickBooks ProAdvisor Directory
- Google
- Instagram
- Networking/Friend/Family
- Other

Submit

Kayla weighs in: Why Method:CRM?

What Kayla loves most about Method are its flexible workflows and real-time, two-way QuickBooks sync. Here's why.

Workflows that work the way you do

Kayla needed a solution that's as customizable as the QuickBooks training and accounting services she provides to her small business clients. The other CRMs she had tried, however, took a one-size-fits-all approach to workflows and this simply didn't work for the personalized offerings Kayla provides her clients with.

Tired of using solutions that didn't make sense for her business, Kayla leveraged Method's custom CRM software to meet her needs. Method's fully customizable workflows allow Kayla to work the way she wants to and help her deliver the tailored QuickBooks training and consulting she's known for more efficiently than ever before.

No longer confined to the rigidness of other CRMs, it's easier than ever for Kayla to give her clients exactly what they need with Method:CRM.

The QuickBooks sync makes it a perfect fit

One of Kayla's favorite Method features is the two-way QuickBooks sync. Kayla says Method is "one of the best tools made specifically for QuickBooks users" and that if you're already using QuickBooks, "it's a no-brainer to also use Method."

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- Kayla Prusinski,
Advanced Certified QuickBooks Online ProAdvisor,
Savvy Bird Consulting

With Method's QuickBooks sync, Kayla can rest assured that her and her clients' accounting data is always up to date as she's "confident that with the two-way sync [she] won't have any duplicates or issues." Overall, Kayla says Method is "the perfect addition to the QuickBooks ecosystem."

What's next for Kayla

Still new to the Method:Partner program, Kayla looks forward to building up her expertise on Method:CRM and wants to share its value with more of her clients. For now, however, she's happy to have a CRM solution that's as customizable as the QuickBooks training and accounting services she provides her clients with.

See what a customizable QuickBooks CRM can do for your business.

Start your free trial today!