Practice Management

# Effectiveness Test

***An interesting new software feature may evolve into something much bigger: the help function of the future for business software.***

Arguably the biggest area of practice inefficiency in the planning marketplace is under-utilization of the software already installed in the office. And by far the biggest offenses are associated with CRM software. It's not hard to see why. CRM started life as a really nifty way to keep track of clients' birthdays and the names of their children. Today, as you can see from the lead article in this issue, the better programs (Junxure, ProTracker, Redtail) have evolved and mutated far beyond the original scope, so that they now function as a core practice management engine, driving systematized procedures and also serving as the connection between client records and the endless paperless office system files.

For CRM software companies, that means that online tech support is constantly in danger of migrating deeply into the practice consulting space. Your question, after asking how to make the software do something, might easily stray into: Well, what's the best way to use this in my office? In some cases, an advisor might have to be shown how to streamline office procedures before some of the more powerful features become interesting, and a lot of potential efficiency-enhancing features are never explored at all. (Who has the time?)

And, of course, CRM vendors are concerned about under-utilization for another reason: will advisors continue to pay for a powerful practice management engine if all they're using it for is keeping track of clients' birthdays?

What to do? Greg Friedman, proprietor of the Junxure CRM program, has found a really creative way to address the underutilization and support issues, which appears to be a painless way to help Junxure users figure out what they're missing. It comes in the form of a computer applet called Junxure Checkup.

Right now, it works like this: somebody from Junxure visits your office, installs the applet on your desktop computer, pushes a button, and the software evaluates which parts of the software are being used--how many templates and in what areas, how many action sequences, how many notes attached to client files (to summarize meetings and telephone conversations), etc., etc.--all listed in past-fail, and also measured in percentage terms.

The output is a report which does several things. First, it tells you where you're using, and where you're underutilizing the program, broken down by topic. Are you using the "associates" function? If 81% of client records have other advisors, parents or children associated with them, then this function is being utilized.

But what about referrals? In Junxure, you can track which clients have sent referrals, how many and who, which helps with all sorts of things--among them, sending "thank you" messages and keeping the referring client apprised of what's going on with her friend and neighbor, and also having a sense of which clients are NOT referring you. The advisor either isn't using this function or none of his clients have sent him any referrals in the past three years.

The system looks for action sequences and templates, and the report comes with links to the part of the user's manual which shows how this function works, plus videos that offer more detailed information. (If the advisor wants more detailed support that falls into the practice management area, then Junxure also offers seminars and counseling, but this costs extra.)

"Initially, I would envision that our person on-site would look over the report with the advisor," says Friedman, "and together they would figure out what two or three things would be most beneficial to start with, to get more out of the system." He's hoping that as the firm collects these reports--anonymously--it will give him and the developers better statistical information on how to configure the program. "If we do this with 50 firms, and 42 of them failed Action Sequences," Friedman adds, "then we can tailor our efforts back to our customers about training, and how to use this function."

Friedman also hopes that this will enhance his company's concept of "plus one," where the customer support staff is trained to, when they have fixed a problem, show the caller another feature. "They'll say, hey, I notice you're working on this; did you know it does this other thing also?" he says. "Now they might say, let me just show you the Junxure Checkup, and you might want to run this yourself, and it has links to our videos, help file, and if you want more help, call us."

What I think is interesting about this concept is its potential to link the "help" system that comes with all software--usually links to a user manual--more directly to the user experience of the customer. In fact, this could be our very first glimpse at the "help" function of the future: the software not only answers questions, but anticipates areas where the user may not know the questions to ask, may not know that this or that function even exists.

Over the course of the next 12 months, Junxure will be testing the checkup function with some of its users, and evaluating whether advisors start getting more productivity out of their software. If they do, then we may remember where we saw this handy software feature first--and enter a period of enhanced productivity in the planning world. ■