



{ a method:CRM success story }

Overview

At first glance, you might think that a sword fighting school is all fun and games, but at Guard Up! Family Swordsmanship, each session is an educational adventure. Training children to wield a sword not only teaches fencing skills but also helps instill confidence. And business at Guard Up! is growing fast. The company has already expanded beyond fencing to hosting special adventure birthday parties, and Wizard and Zombie themed camps.

The Challenge

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The Solution - Method:CRM and QuickBooks

A longtime Intuit user, Meghan wanted a CRM product that worked with QuickBooks Online so the two systems could be connected. She also wanted to avoid entering customer data for a second time. She went to Apps.com, and that's when she found Method:CRM. They offered special customization that their competitors didn't offer, and it was a top rated app on Apps.com. The Method:CRM QuickBooks integration delivered all of her customer and financial data into one system while enabling different users different levels of access. That meant her employees could use the customer management tool, but only she had access the company's financial information.

The integration between QuickBooks Online and Method:CRM was smooth. Meghan worked closely with the Method customer service team to optimize the software for Guard Up!. There was training time required for her employees, but it was well worth the effort. Meghan enjoys working with Method's customer service team because they are responsive and helpful. She also likes the Method Tweets that tell her about software updates. The time she's spent customizing Method:CRM has been well worth it for Guard Up!. When the company offers franchises, the customized software will be ready for their franchisees.

Business Benefits

The software duo of Method:CRM and QuickBooks Online provides Meghan with focused visibility into how her company is doing. She can easily measure the productivity of employees, new offerings, and

departments. Meghan says that the data integrity of the two applications working together enables her to make better decisions for her company, and she finds herself less stressed. Method:CRM is robust about tracking communications with our customers, so her staff has better information including a complete history of their transactions and conversations. Customers feel special because no matter which employee they talk to at Guard Up! that employee knows their child's story. Guard Up's retention rate is much higher since they started using Method:CRM.

Guard Up! uses Method's contact logs to track all customer and sales lead information. If someone is interested in Guard Up's services, they make a phone call or fill out a form. Then their salespeople, called story collectors at Guard Up!, interview the customer to discover their needs – and their children's passions, areas of growth, etc. That creates a history. That history evolves with every interaction. Because Meghan's customers are children, teenagers and parents, the staff constantly checks in to make sure their needs are being met.

QuickBooks Online and Method:CRM have continued to grow and evolve with Guard Up!. Meghan is now looking forward to franchising her company and taking Method:CRM and QuickBooks Online along for the ride.

"Method and QuickBooks Online wrap around my business, instead of expecting my business to adjust to their software."

This story was originally published by [Intuit](#).



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About Guard Up!

[Guard Up!](#) offers classes, birthday parties, and summer camps for kids, teens, and adults. The educational adventures at Wizards & Warriors Camps feature live interactive stories that teach academics and skills, Fencing, Swordsmanship, NERF and tons of other fun things to do. Located in Burlington and Waltham, MA.