# Cloud-Based Professional Services Automation Solution

**Geoff McQueen**
*Founder & CEO*

**CEOCFO:** *Mr. McQueen, your website indicates that AffinityLive is the most complete professional services automation solution on the market. How so?*
**Mr. McQueen:** Rather than trying to be a specific tool, such as a CRM that tracks your customer database or a project management platform, we are about running an entire business. We combine seamlessly what would otherwise be considered five or six different product categories. People are running a business, not solely a customer database or project. Our customers are running a company with many moving pieces, and they need software that helps them in their endeavor.

**CEOCFO:** *Who is using your services today?*
**Mr. McQueen:** There is a big footprint with the early adopters and professional services such as IT services firms and digital agencies. We also have a bunch of other folks such as engineers and designers.

**CEOCFO:** *What do you understand fundamentally about the process that perhaps others do not?*
**Mr. McQueen:** We understand the problem very deeply because my co-founders and I all used to run professional service businesses. We understand that frustration associated with making the business work, not just a CRM here or using a project management tool there. It is an insight that we have. Most of the operators in the market come at it from a technology perspective first, whereas we came at it from a business point of view when our insight was that we needed technology that didn't yet exist. We are all about giving our customers a system to manage all of their operations, and that is special because most technology players come trying to find out what computers can do, not what the actual business needs are. That gives us an edge in the market, and it has helped us shape a successful product and maintain a rapid growth rate.

**CEOCFO:** *What is involved in implementation? If someone wants to start using your service, what is the pain point?*
**Mr. McQueen:** They have a few pain points. One may be that they had an important client account they have lost. The other one that is happening a lot more is a situation where they are growing and hiring people. They were at 10 people and now are at 20. They were making $2 million a year and now they are making $3.6 million a year. How are they making less money per person than they were when they were smaller? Surely, things should be getting more productive as they specialize. They grow the company and see cash flow pressures they were not expecting. They will then realize that their profitability and margins have been dramatically squeezed, and they do not even know how it happened. If they look closer, they see that it is because a bunch of projects went sideways and they lost a couple of critical accounts. Now, they have a full-time staff onboard that they are trying to keep busy, while at the same time the customers are running for the exits.

What we do is we make it easy for them to transition to having a system to run their business, and for the first time, give them visibility into things like profitability, utilization and customer tempo without them having to lift a finger. They do not have to produce reports in spreadsheets to understand everything. The fact that it's real-time and it is user-friendly means we free them to do what they love doing. Nobody got into running an architecture firm, accounting practice, design agency, advertising firm or PR company so that they could do the monthly billing and mess around with spreadsheets and reports to understand what the heck their staff has been doing. Nobody got into the business for those reasons. We make it easy for them to run the business so they can get back to doing the things they actually love and why they got into the company to start with.

**CEOCFO:** *How do you cut through the noise and reach potential clients?*
**Mr. McQueen:** First, we have a product that actually does what people need as opposed to trying to convince them that they have a problem they do not have. Only a few companies actually solve existing, visible problems. We give insight into profitability and visibility of how your customers are working out. Other products will help you put them into groups and categories, a prettier way to set up your database, but they will not actually solve the business questions you have. The second thing is we make the information about our products accessible and that causes our existing users to share the word with their colleagues. Lawyers talk to lawyers, accountants talk to accountants. There is a lot of interaction and that is really important to how people find out about us.

**CEOCFO:** *How is AffinityLive better today than it was a year ago?*
**Mr. McQueen:** We have learned the importance of prioritizing around what clients actually need and not our projections of what their needs are. The other thing is that we are building on what we have established and are making it ever more powerful, automated and easy to use. We want you to have that business that can run itself and only tell you when it needs intervention. That way, you can concentrate on the things you love doing.

> **"No one starts a business to do billing and monitor spreadsheets. We are here to let people get back to the job they love to do." - Geoff McQueen**

**CEOCFO:** *Would you tell us about the CRM that you offer? What is different about your approach?*
**Mr. McQueen:** The most important attribute of our CRM is that it works the way that you already work. When you are emailing prospective clients or advertisers, much of that is going to be happening in your program on your desktop or on your smartphone. This the way we work and the problem with most CRMs is they require users to stop working the way they already to do fit into the system. With AffinityLive, we automatically capture, track and index all emails, meetings, appointments in your calendar and synchronize that back into the customer record without you lifting a finger. All information is synched automatically in the background without your having to do anything beyond your actual job.

That automation is the real secret sauce and the compelling feature of AffinityLive CRM. It means that you can concentrate on doing your work the way you are most comfortable with, and you know the CRM is working in the background. The other advantage of an automated CRM is that when a client emails you, you know that it is recorded without your need to copy other employees on your response, or copy the text yourself into the system, because the automated CRM has already sorted that information.

That means you have a lot more intelligence that sits on top of that CRM. It can tell you that you have a big IT client that you have not talked to in the last six weeks. You should probably close that gap and say hello to keep that relationship alive and healthy. An automated CRM helps you run your business, not keep you from doing so.

**CEOCFO:** *How is business?*
**Mr. McQueen:** It is really good and growing strongly. It has tripled in the last 12 months. It is accelerating greatly, and we also just announced a round of $2 million in funding.

**CEOCFO:** *What accounts for the tripling over the last year?*
**Mr. McQueen:** We are a startup, so every year is a growth year for us and things are moving strongly. As we grow, improving our product and touching more business owners, those customers have had the benefit of seeing, experiencing and then sharing our product with their colleagues.

**CEOCFO:** *What might we expect a year from now?*
**Mr. McQueen:** We are looking at tripling our revenue, and introducing more and more customers to the product to help them continue to better their business operations.

**CEOCFO: *Why choose AffinityLive?***
**Mr. McQueen:** No one starts a business to do billing and monitor spreadsheets. We are here to let people get back to the job they love to do.

<center>**Interview conducted by: Lynn Fosse, Senior Editor, CEOCFO Magazine**</center>

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# For more information visit: **www.affinitylive.com**

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