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Welcome

Congratulations on taking the next step to grow your business. You join an elite and successful group of companies and organizations who incorporate GreenRope to expand their businesses, generate revenue, and establish a symbiotic relationship with their clients. Our VARs span the globe and make up our network of thousands of businesses, managing millions of contacts, and sending billions of emails.

Rest assured that you will be well taken care of in this process. From setup to training to ongoing support, you are not alone. Whether your staff is providing first line support, strategic consulting, conducting webinars, or hosting seminars, we are here to help.

We are also continually improving our system and features, which assures that you and your staff will be better armed with better tools. Your feedback is very important to us. We depend on your comments and suggestions to advance our software and make sure it the best it can be.

The Value Proposition

You are no doubt reading this because you have found the value of being a GreenRope VAR something you would like to incorporate in to your existing business model. Before getting in to more of the details about the VAR and how your software will be able to help you increase revenues and make an impact on your market, we want to show you why on a high level, this is important.

First, your VAR will create a recurring revenue stream. Put simply, every part of the software that you will offer to your clients represents an opportunity to make money. Generally, it's designed so that at least 50% of what you can charge your clients will be profit. The revenues come from:

- Recurring monthly charges based on the number of contacts the client has loaded in to the account
- Private labeled emails, for which you can charge a premium per-email rate, is 100% profit to you
- Transactions, so that every time your client charges an event registration fee or sells an item through their online store, you make a margin
- Contacts research, providing a profit every time your client chooses to augment their existing database with information about their contacts
- Website tracking provides another source of profit, whether from a page generated by your VAR software, or on a page where the web tracking javascript has been placed. Each pageview and each conversion tracked (e.g., a sale of an item on a web store) represents an opportunity to generate profit.

Each profit-generating method also will generate revenue for the software user, so in all cases, you are in the middle of a win-win situation. By providing this software to your clients, you open the door for them to grow, and the more they use your software, the more money they will make, which represents more revenue to you.

Aside from the profit-generating aspect of being a GreenRope VAR, there is also the bond that it creates between you and your client. When someone makes the decision to use your software, they are committing to store their organization's most critical information with you. The CRM, which tracks ongoing relationships and interactions with their contacts, is an integral part of any sales or membership cycle. Email marketing and the tracking associated with it provides a history of behavioral information, as do any surveys, SMS, event attendance, and website tracking/conversions. All of this information is nearly impossible to transfer to any other system due to the complexities and inter-connectedness of it – no other system in the world can do what your software will do, and no one will want to change once they integrate their business processes in to it.

This bond creates the permanency of the previously mentioned profit on an ongoing basis. Once committed, your client will never ever want to leave. Not out of feeling trapped, but because they will find your software will be a part of what they do every day. They will rely on you and your software to make their business run, which means they will never, ever want to leave. Recurring revenue streams are the key to growth, and every new client you bring on represents an increase in the ongoing recurring revenue.

All you have to do to generate this permanent, increasing recurring revenue is find the clients who are smart enough to know that this software can and will help their organization. Your existing network of contacts is a great place to start. One key advantage to the white-label aspect of our software is that you can brand your clients' outgoing emails and the websites they build with a "Powered by You" logo (where "You" is the brand identity or logo you choose). This means you reach out to not just your client, but your clients' clients as well. When your clients use your software to update their social networks, it links back to you as well, showing your brand to thousands of potential clients you previously had no exposure to.

Finally, we have the ability for you to charge your clients for recurring services on a monthly basis. Any clients that have ongoing retainers can have "Additional Services" added to the charge we automatically make for you to debit your clients' credit/debit cards. If you want to charge a client on an going management fee, just tack it on, and we'll automatically add that to their bill in addition to the previously-mentioned usage charges associated with your software.

The beautiful part about this model is that as your clients become more successful through the use of your new software, they will pay you more. We have many success stories from our VARs. The San Diego Chamber of Commerce, for example, went from 0 to over 600 clients in a year, and in the process reduced turnover from their organization by over 80% while increasing new membership additions by 38%.

GreenRope is here to stay, and we are happy you have chosen to partner with us in your growth. Read on to learn more about how this will work and to pick up some tools about methods you can use to increase your revenue stream.

Setup

You have no doubt either completed or are in the process of completing the VAR portal setup process. It's important that you complete all of the steps. Of note:

- Choose a domain name that is memorable and simple
- Use modern graphic design (logos and banners should give the appearance that you aren't stuck in the 90's)
- If you have a dedicated IP address that you are sending your emails through, be sure to set up SPF, Domain Keys, and your emailreg.org registration
- One of the things we do to make your life easier is automatic billing of your clients. Set up your Authorize.net account with the Customer Information Manager (CIM) active so we can do this for you.
- Create an account on GreenRope and get familiar with the system. Use as many aspects of it for your own business. This will make it easier for you to explain all of the features and power available to your existing clients and prospects.
- Review all of the tutorial videos on the Help page. It's good for your own understanding of the system, as well as familiarity with what you can direct your new users to view (the more you direct new users to these videos, the less burden they will be on your own staff).

- The blank.html page is an important part of the design of your portal. It acts as a wrapper around the content we put in the middle of the page (e.g., the login form and the create account form). Make sure you work with someone familiar enough with HTML to create the page you need, as it forms the consistent brand you are presenting to your users.

After your portal is set up, be sure to schedule a conference or screensharing session with our support staff. After your staff has reviewed the tutorial videos, we will be able to answer specific questions and touch on advanced topics.

Billing

Authorize.net will automatically bill your customers on a monthly (or annual, for accounts that are set up as Annual PayAsYouGo) basis. Calculations are all done automatically and charges are all done using Authorize.net's secure API.

You can also enter in account credits (these are drawn down on every month if they're greater than zero), and manual payments (you can manually enter in a payment, like you received a check for an account payment). Active accounts can also be charged manually, entering an amount and description and manually charging the credit card on file.

Developing Your Business Model

There are two main types of customers you will target and encounter – the do-it-yourself user and the full-service user. It is important that you get an understanding of your clients' needs early on, so you can set expectations and provide upselling and cross-selling opportunities.

The do-it-yourselfer is the person who wants to maintain total control of the data in their account. Your approach to these kinds of clients is one of providing assistance without getting drawn in to doing things for the client. We recommend focusing on "showing how to fish" as opposed to "giving the fish" to the client. In general, we recommend at most offering import assistance for new users. Since this is often the biggest sticking point, if your support staff provides direct assistance in this step, it's likely to be worthwhile – once data has been uploaded, the client is locked in. We recommend doing the import for the client if the client is unable to do so, due to the many idiosyncracies that come with managing file formats. You cannot assume that the average user knows what a tab- or comma-delimited textfile is.

Managed service clients are a little different. They are more interested in having external organizations manage the creation and distribution of their content, as well as having the intelligence gathered from these efforts reported back. These clients are more likely to understand the value of the advanced features we offer. The message about what your software can do for them is likely going to be more tailored to their specific needs.

Email Marketing Policies

Email marketing is a large component of the feature set offered by your portal. It is important to preserve the reputation of the IP address you send emails through. This IP address is also referred to as an MTA, or Mail Transport Agent.

We have dedicated high-volume email sending servers. You can have one or more dedicated IP addresses that these servers can send through. If you are managing more than one IP address (MTA), you can change the default MTA as well as which accounts are assigned to which IP.

Email deliverability is a commonly-used, and important term you will hear a lot in the email marketing space. In simple terms, it means that a large percentage of emails your clients send go to their intended recipients' inboxes (as opposed to their junk/spam folders).

Building and preserving the best deliverability you can is important to the sustainability of your portal. Because so much communication is email-based, getting those messages to the inbox is critical. Our staff monitors deliverability of your IP addresses and will let you know if we see any of your clients causing problems, but ultimately it is up to you to educate your clients on the importance of responsible emailing practices.

If you don't have a lot of experience in the realm of email marketing and deliverability, it would be good to brush up on email best practices – if you Google that phrase, you will find many articles on the subject. At its simplest level, it comes down not sending spam. Specifically, making sure the recipient has given permission to be sent email by that sender, and that the recipient recognizes that sender. Purchased or rented lists, scraping emails off of websites, or using single-opt-in signup forms are all going to cause you huge headaches, so make sure your clients know not to import these kinds of contacts in to their accounts.

SPF and Sender ID

SPF, or Sender Policy Framework, is a way you can use your DNS to ensure your emails have a better chance of landing in the inbox. SPF basically tells the world that emails coming from your "From" address (sales@something.com) can only originate from certain IP addresses or domains. If you add our email sending IPs to your SPF Record in your DNS, they have a better chance of being delivered to the inbox. Instructions for how to do this are in the knowledge base.

CAN SPAM 2003

You may hear from some of your clients that they are CAN SPAM compliant. This is a US law passed in 2003 that requires commercial emailers to include certain information in their emails, such as a physical address, and must not have deceptive subject lines. While this is important to abide by, it falls short of email marketing best practices, which if not followed will adversely affect your deliverability regardless of the legal sufficiency of the emails sent.

Affiliate Marketers

Beware of affiliate marketers. This small, but very active group of emailers knows what to say to placate you and your staff. They will say they have confirmed opt-in records with time and date stamps. Unfortunately, we have found that they will often lie – we have caught and subsequently fired over 10 companies who have done this. They will also often open several accounts, sharing contacts between each of them, so that an unsubscribe that would normally prevent them from sending emails to that unsubscriber is bypassed because it's sent via a totally different account. Many will also provide payment for a month and then let their credit cards get declined on the next billing cycle.

The best defense against affiliate marketers is to be diligent about asking for the source of their contacts. We can also help you identify the number of contacts in common between an account and other known affiliate marketers – a high number of contacts in common means there's likely to be contact sharing going on, which is indicative of irresponsible email marketing practices.

You can also identify affiliate marketers by their content. It's often the "get rich quick" or "get rich like me" drivel that pollutes much of the email world. The unfortunate part about it is that it actually works – a sad statement about the average mentality of the email recipient.

Self-Protection

To protect yourself, your Portal Manager has a field that allows you to set the maximum number of contacts in an account. Search for an account and you will see that field there. Trials all start with a maximum of 150 contacts, and it is up to you to manually increase that for larger accounts. Be sure that before you do, you know where those contacts are coming from. Our approvals process sends an email to the approvals address you set in your Portal Manager.

There is also a limit on the number of emails an account can send in a day and in a month. These are set by default to be 2x the maximum number of contacts allowed (see previous paragraph) per day, and 5x the number of contacts per month. For accounts that send a lot of emails, you may need to manually adjust this by entering a number in one or both of these fields. If you ever need to place an account on hold temporarily (e.g., to investigate their email sending practices), you can set the max emails per day to zero.

As part of your portal setup, we establish relationships between your MTAs and all of the major ISPs , so that if a recipient clicks on the "Report this as Spam" button in their email program (Gmail, Hotmail, Yahoo, and most other email programs have this), we are notified and automatically unsubscribe the contact. This also contributes to the reputation meter, which you will see in your Portal Manager as well as when you log in to an individual account (on the Home/Dashboard page). You will want to periodically conduct an audit of your acccounts' reputations to ensure they are abiding by your policies.

The best way to sustain your business for the long term is to educate your clients on how to maximize their deliverability and abide by best practices. We impose stiff fines and fire users who send emails that generate complaints with missing or fabricated opt-in records. Our rule of thumb is $50/complaint if it's accidental or a first time offense, $100/compaint if it's intentional or a second offense, and immediate account termination without refund for repeat offenders.

Single vs Double or Confirmed Opt-In

The opt-in process establishes a proven relationship between the sender and the recipient. An opt-in record contains a datetime stamp, an IP address, and the URL of the signup form. There is a substantial difference in the value of a confirmed, or double-opt-in record. A confirmed opt-in record means that the person who filled out the subscription form was sent an email and clicked on a link in that email to confirm his intent to sign up. This critical step ensures the person filling out the form is who she said she was. A single-opt-in form, while more likely to generate a few more conversions, does not have any confirmation of the identity of the person filling out the form. In case of a spam complaint, a single-opt-in record does not carry much weight.

In case of a spam complaint, you will want to provide a confirmed opt-in record to the anti-spam filtering service. Spamcop, Spamhaus, SORBS, MAPS, and a few other big companies make their livings by maintaining a database of MTAs known for sending spam. If your MTA gets a bad reputation because one of your users send spam through it, you will have to take immediate action to de-list that IP address and regain your reputation. If you do not, major ISPs worldwide will start filtering your messages.

Your Portal Manager (under the My Account area for Portal Managers)

As a VAR, you have a Portal Manager that you use to manage the accounts and finances associated with your portal. You can have as many Portal Manager accounts as you would like, but we recommend limiting access to the Portal Manager to just a few trusted managers. The GreenRope support staff has access to your portal manager, in case you need assistance with any of your accounts.

The Portal Manager has all the tools you need to manage your entire portal. As part of the initial setup, we recommend you review all of the setup options available to you in your Portal Manager. You can set configurations, display options, pricing, and more all in this single location.

Managing Accounts

The first and most often used function is the ability to look up accounts in your portal. These accounts are searchable by email address, website, account status (Trial, Comp, Active, etc) or the MTA (this last one makes it easy for you to manage the reputation of multiple MTAs).

When searching for an account by login email address, you have to enter the complete address. This is because the usernames (login email addresses) are stored in our database with one-way encryption. This means we can't ever "back out" part of the email address – only the compete email address will find a match in the database. This is for maximum security and protection of your login credentials.

After you find an account, you can click the Modify button to adjust any settings (pricing, branding, discounts, apply credits, etc). You can set Trial and Comp accounts to expire after a certain date (you set the default Trial length in the View Portal Settings page). We also recommend you use the Notes field to keep track of changes you make to the account. If you are logged in to the primary Portal Manager account, you will also see a link to the CRM. When new accounts are created, an entry is made in the Primary Portal Manager account automatically (this is another setting in the View Portal Settings page).

As mentioned previously, you want to be diligent about how large you let accounts be. Don't set too high a number for Max Contacts – you want to make sure your clients aren't "accidentally" uploading a large purchased list. On the other hand, you also don't want to set too low of a limit, or the user will get irritated at having to ask for approval over and over again.

There are default limits set for the number of emails sent in a day and in a month. They are 2.5x the number of contacts per day and 5x the number of contacts per month. These are safe for most clients and should not need to be altered. Some users do more than one email per weeks, so you will want to be cognizant of that volume and may have to enter a manual number in the max emails fields.

Other Account Management Tools

You can manage other settings in the accounts that fall under your portal. Setting an expiration date on a trial or comped account is a good way to shorten or extend the default trial length that you define in your View Portal Settings page. You can also enter manual charges (in case you have a client that wants to pay you by check), as well as enter a manual charge with an accompanying charge to the credit card the client has on file.

Setting Pricing

We set up pricing on GreenRope to compete with email marketing service providers. You can set all of the pricing levels and breakpoints (up to 7 different plan levels) in your Portal Manager. This gives flexibility for any size organization that may be using your software.

To view your pricing levels, click the View Portal Pricing button. You will see how to set the breakpoints for the 7 pricing levels and what your wholesale cost to GreenRope is.

This area also shows you how to update your Authorize.net settings, in case you need to request a new API Login and Transaction Key for Authorize.net's Customer Information Manager.

Keep in mind these are the default price points that are available to all accounts when they click on the "Upgrade Now" button (or My Account > Subscription, which goes to the same place). You can manually set custom pricing by calling up an individual account and setting it there.

PCI Compliance

The question will come up from time to time about whether or not your portal is PCI compliant. This is a requirement by all merchants that credit card data is protected. Your clients' credit card data is safe. We do not store credit cards on our servers. Card data is stored at Authorize.net. All charges are run using their API, which provides us with a unique identifier to charge a card to you – card numbers are entered over a secure SSL connection and are never actually recorded on our networks anywhere. Further to this, our network is periodically scanned by independent security agencies to ensure we meet PCI compliance requirements for network security.

Setting Up Trackable Promotional (Discount) Codes

If you would like to offer trackable discount codes (aka promotional codes) to your users, you can do so with the "Set up Promo Codes" in your Portal Manager. Each promo code has an expiration date that depends on the date the account was set up, along with a discount (either a fixed dollar amount or a percentage discount). Your portal manager's Financial Report will show revenue generated per month for each discount code. This is useful for paying third parties (other companies and/or independent salespeople) to promote your accounts through affiliate programs. Note that promo codes work independently of the "How Heard" options that users can select when they create an account.

Communicating Benefits

As you know, showing the benefits of software is an important part of the sales process. There are 3 primary benefits that users of your software will realize:

- **Saving money.** By integrating all of the functions that your software can do, organizations no longer have to purchase subscriptions to other software components. Savings depends on the number of features in use, but in general your clients can expect to save 60-90% in total cost of ownership over competitive solutions.
- **Saving time.** Every time you add a moving part to a system, it gets exponentially more complication. Someone may be able to handle a CRM-email marketing integration, but throw one more moving part in the mix (like event management, or a unified calendar, or project management) and it becomes unmanageable. As soon as you rely on an API to keep different pieces of software in synch with each other, you introduce changing specs, multiple modes of failure, and more resources required to babysit those connections.
- **Empowering the business.** This is the big one. Most organizations run with information in silos, not shared. The email marketing team is told to do one thing without an easy way to segment and tailor their message. Salespeople relying on CRM don't know what else their prospects are doing – are they attending events? Opening emails? Buying things? Visiting websites? These missing links are now automatically filled with your new portal.

The process of educating a business on these concepts can be challenging. As Doug Feeney puts it, "momentum is a hell of a thing." In some ways, particularly with full service clients, you must approach them as a consultant, educating them on why this can help their business. Most companies have evolved organically, and while they may recognize inefficiencies, they are often afraid of change and unwilling to take that step without a good push.

In our experience, it comes down to demonstrating how these benefits can affect both the top and bottom line. Making marketing more effective, giving better tools to salespeople, and saving money on software are all key points.

Sometimes it makes sense to focus on one specific tool and break in to a company that way. The most common tool is email marketing, as every business needs it, it's a mature industry, and provides the most compelling reason for transferring all of the company's contacts over to your software. Event management is another one – even for small events – so the company can invite people to attend an event, collect payments and handle registration via their own event website and calendar. If you catch a company in the midst of evaluating new CRM software, you have the greatest chance of gathering the entire suite of products your software offers.

Then there are those companies completely unwilling to change, despite knowing they are horribly inefficient. We have seen this happen, whether because everyone is "too busy" or afraid of change or paranoid of political implications behind changing an organization's direction, some obstacles are insurmountable. Pursue these at your own peril – they can be great time sinks and even if you do win them over, they will require considerable support and training resources.

Advanced Features and Selling Points

A big part of our history comes from many years of talking with users to understand what they needed. Meeting those specific needs is what drove much of what you see when you log in to your VAR portal. The common thread behind the companies we talked to was the need for integration, to simplify the way they do business.

This integration provides a convergence of information and power. Tying a CRM together with email marketing, social media, website traffic, events, projects, and more brings this power into one system. This biggest challenge this offers, of course, is that because your software does so much, it may be a little overwhelming to the first-time user. It can be especially overwhelming to the user who doesn't understand the importance of these fundamental business functions.

One of the easiest ways to overcome this fear is to demonstrate how spending a little time to understand the system will open up doors to things they never thought possible. Below are some of the features we offer that set up apart from the way most businesses work, and the way even the most integrated businesses work.

CRM

Our CRM is simple to set up and flexible enough to manage most any business's needs. We start by dividing contacts in to groups, with each group having its own user-defined data fields. This means that beyond just the standard information fields about a contact (name, address, phone, etc), an organization can make up their own data fields they want to store.

Because the CRM ties in with our email marketing and sign up form functions, all of these fields can be updated by the contacts, saving data entry time by your client. These fields can all have their own update security settings, including whether or not contacts can see the data being stored about them.

Email Marketing

This is the root of our business, as we started doing this back in the early days (2000). We grew from here but have always been pioneers in technology used to make email marketing more effective. Mail merging, dynamical rule-based mail merging, dynamic countdown timers, surveys with hundreds of templates and infinite color combinations make our email builder second to none. Use our advanced filters to specifically target who should get that message, based on demographic, geographic, or behavioral information you have collected about them.

Because we have always held a strict anti-spam stance, we have industry-leading deliverability. Note that this is somewhat dependent on the reputation of your individual IP address. We set up whitelisting arrangements with the major ISPs, Return Path (a whitelisting service), and handle complaints for you, but that isn't a guarantee of inbox placement.

Drip Campaigns

Drip campaigns are a powerful tool that send pre-defined sequences of emails to your contacts. In our system, they are defined by the groups they are in (Group Setup > Drip Campaigns). You set the timing and the messages, and any people added to a group are automatically sent this pre-defined message sequence. This makes for a powerful tool when coupled with signup forms, conversion tracking, and other marketing automation goals.

Social Media

In the modern era, integrating multiple methods of communication with your social media outlets is key. When you send an email, it should use our "Share Placeholder" function, so recipients can repost that email's content on their social networks. You can also simultaneously post your message on social networks that you connect to your account (this is done in the Social area or the My Account area).

Surveys

These are a good way to get feedback from your contacts and since it integrates with your CRM, the data associated with survey responses is tied to contacts. There are several types of survey questions, which should cover the bases for what most of your users will need.

Websites

Every group has its own website, meaning a company can create many different pages (up to 100 per website), each with its own blog, storefront, calendar, and membership listing (each of these is optional). This makes it easy to build lots of websites, which is good for SEO, landing page testing, and quickly building a web presence.

Integration with CRM means website tracking opens doors normally reserved for really large companies. There are only a couple companies that we know of that offer an integration between CRM and website traffic (letting you see when contacts from your CRM visit one of your websites) and they are all very expensive and complicated to setup and integrate. With your GreenRope VAR software, this integration is easy. You place some Javascript on every page you want to track and we take care of the rest automatically.

Use the Website > Website Tracking area to set up your tracking. Just by placing the Javascript on the pages you want to track, you will automatically start to see website visiting data in the CRM for individual contacts. The marketing automation piece is where you step in to the realm of things that most companies haven't even dreamed of:

- Getting an alert when someone you know hits your website. You can set up alerts that send emails to your salespeople when someone hits a threshold of page views or specific pages. If a salesperson is alerted when a known contact is interested in a product, it's a huge advantage and increases the likelihood of a sale by 40%.
- Setting up automatic emails and drip campaigns as a result of website traffic. You can send an email to someone in your CRM if you see the known contact hit a specific page. A high-value product or service may deserve some special attention and can be placed in to a group, removed from a group, and therefore added to a drip campaign (series of pre-defined emails).
- Automatic shopping cart abandonment. Your conversion tracking system watches people progress through a conversion process. You can assign multiple stages, and if someone doesn't complete the next stage in a certain amount of time, you can add them to a group and send them emails. This alone has shown to increase sales by an average of 60% for online retailers.

IMAP Integration

This ties in individual emails from someone's personal inbox to the CRM. We store the first part of the email message, with a link to pull up the message details if more information about that message is required. This is a good tool to bringing communication between sales people and clients/prospects to a central database (and if the salesperson leaves, they don't take their contact data and interactions with them).

Events

Your portal's event management system gives you the flexibility to manage multiple events, handling attendance, reminders, payments, and registrations. You can set up many types of options, so any event type can be managed. And since attendance data ties in with the CRM, that data is stored there. It also ties in with the email marketing system, so it's easy to send emails to contacts who attended (or didn't attend) a particular event.

There's also a check-in process, which is very useful for manning a table that checks people in to an event. You can predefine an email that goes out to all checked-in attendees (perfect for a thank-you email), as well as put them in a group.

Project Management

Having your project management system integrated with your CRM brings together the workflow of people in an organization to one central place. The project manager works like most, displaying a Gantt chart and providing for subtasks, hour tracking, and updates by email.

The project manager is useful as a template, as well. A company can create a project and copy it to a future project, perfect for setting up standardized processes and duplicating them for multiple clients.

Advancement

This was something we originally wrote for the Boy Scouts, as a way for troops to track their scouts' merit badges and advancement in rank. As an application for general business, it can be used to track certification processes and skill mastery. If you manage certifications for your clients, you can set up any number of requirements that must be met and the ranks and badges associated with those certifications.

Knowledge Base Management (Wiki Tools)

A wiki is a collaborative place for people to store data. You can offer your wiki tool, integrated in to your platform, as a way for an organization to store its knowledge base in to a central location that employees or clients can refer to. Wiki topics can be public or private (requiring a login to your portal as a group member). Keeping this knowledge in a single place makes it easy to manage this data and ensures that if someone leaves a company, all is not lost.

Export Controls

Being able to export data is important if someone wants to do custom data manipulation. It's also the greatest likelihood of theft. Given the value of the data contained within an account, exporting requires approval by email from the account owner. This owner can elect to turn on exporting for 30 minutes or a year (and can always revoke it manually) to protect the account from theft of data. No other CRM or email marketing system has this kind of protection in place, a significant advantage for us.

Shared Access

One thing we do significantly differently compared to other CRM companies is provide unlimited users of the system without additional cost. While companies like SalesForce.com charge $30-120 per user (or per "seat"), we include unlimited seats for free in an account.

A Note About Security

Our network is very well protected behind firewalls, load balancers, and data encryption. All usernames and passwords are triple-encrypted with NSA-standard schemes to ensure compromise is beyond the realm of possibility. By far the most likely source of a login from someone who shouldn't is a lapse in human judgment (a user writing a password on a piece of paper, or telling the wrong person). We do not disclose the details of our network configuration, hardware, or methods, so as to make reverse engineering of any part of our system more difficult.

International Implications

If you have clients or are interested in finding clients outside of the US, there are some things you will run into that will bear relevance to being able to support growth in those markets. One is information security, specifically in Europe, EU Safe Harbor. The international law, in combination with local laws, requires companies with an online presence to post privacy policies regarding the storage and sharing of personal information. The big fear is that by collecting cookies, you can learn a lot of information about someone if you combine them with multiple sites.

These laws do not apply to closed systems, as long as the website posts information about cookie collection in the company's privacy policy. Companies that do things like ad re-targeting are affected by these laws, as they involve collecting information across multiple, unaffiliated sites. But since our tracking is only for sites and emails that are sent by one of our users, we the restrictions on the collection and use of cookies does not apply.

Competition

It's hard to find competition that comes close to doing all that we do.

InfusionSoft and Zoho CRM are the closest, but neither has the depth in automation, email marketing, project management, or event management.

Individually, there are lots of competitors in individual feature areas.

- CRM – SalesForce, Oracle, Siebel, Microsoft
- Email marketing – Constant Contact, Mail Chimp, iContact, Vertical Response
- Project Management – Basecamp
- Wiki – MindTouch
- Surveys – SurveyMonkey
- Event Management – Evite, EventBrite, Cvent

In taking data out of existing software platforms, you want to make it as easy and seamless as possible. This is why we offer this as a free service to new clients.

Summary

You should feel a little better prepared now to take your new software platform and find new clients, educate them on the features and benefits of your software, and create a solid, lasting bond between you. Remember that we are here to help and support@greenrope.com is always here to answer your questions.

We value you as a partner and want to empower you to grow your business and ultimately create a permanent recurring revenue stream that your clients will appreciate as well. Thank you for being a part of our family!