

Strengthening Customer Relationships with Evernote Business

“In today’s world, work processes can change from day to day. Evernote’s flexibility adapts to my team’s needs at any given moment and allows us to move with agility.”

Lars Bobach
Founder, Lars Bobach Online Marketing AG



Since 2014, Lars Bobach Online Marketing AG has crafted hundreds of custom digital marketing strategies for small- and medium-sized enterprises all across Germany.

Lars Bobach first came across Evernote in 2011, when he incorporated it into his daily workflow. Upon founding his own online marketing agency in 2014, he decided to purchase Evernote Business for his entire company. Today, the team of ten relies on Evernote Business every single day as their go-to tool for managing customer relations.

Evernote at the core of customer relations

At the core of the team’s customer relationship management (CRM) system is the Evernote notebook. A new notebook is created for each of the agency’s 90+ clients, and any information pertaining to a client can be found in the dedicated notebook. Everyone on the team has access and is able to contribute, create new notes, and add or update information. “If I have to get in touch with a customer, their notebook is all I need.”

Easy to get started and even easier to use

One of the things that Lars finds most powerful about Evernote Business is its usability. “As a tool for managing information, it wasn’t difficult to implement at all,” he recounts. There was minimal coaching involved to get the entire team using Evernote regularly. Once onboarded, the team soon found how easy it was to add information into Evernote.

From their desktop, team members can create new notes and attach relevant documents such as strategy papers and contracts. On their mobile devices, they can scan and upload copies of invoices and receipts into a client notebook. Important email threads are forwarded directly into Evernote and saved as new notes. Some team members also record audio notes while on the go or interviewing a customer. Keeping all of the work in Evernote has eliminated the need to send internal emails, and the team no longer needs to use emails for internal communications.

No organization—no problem

Lars believes that overthinking hinders many people from getting started with a new tool, but with Evernote, there is no need to plan too much. In terms of organization, the team keeps it to a minimum, as processes take time to maintain and change often. “If you stick to a rigid folder system, you lose a lot of time getting to your information.” Lars recommends giving notebooks and notes minimal structure, instead preferring to rely on Evernote’s search bar. “You’ll find what you’re looking for much quicker.”

Industry

Consulting

Size of company

10 employees

Everything, together

Evernote notebooks are a hub for inspiration captured in any form from sketches to web clips to photos of whiteboards. When everything is together, no idea is lost.

Avoid duplication of work

Evernote’s Context feature surfaces relevant notes and notebooks your colleagues own, ensuring you never lose time working on a task that someone else has already completed.

One search

Find all your client information in one place, from contact details to creative briefs to project to-dos. Evernote not only searches for text inside images and documents, it even recognizes your handwriting.