

Presented by

NANNY TAX & ENGINEHIRE



**An agency owner's guide:**

**BUILDING A SMART &**

**SEAMLESS HIGH TOUCH CRM**

**with Automation and Smart Matching**

# AGENDA

- **WHAT IS A CRM/ATS**

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- **WHY THIS MATTERS**

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- **TRENDS TO KNOW**

# WHO AM I?

DIRECTOR OF PARTNERSHIPS AND COMMUNITY

CHILDCARE EXPERIENCE OF 20 YEARS

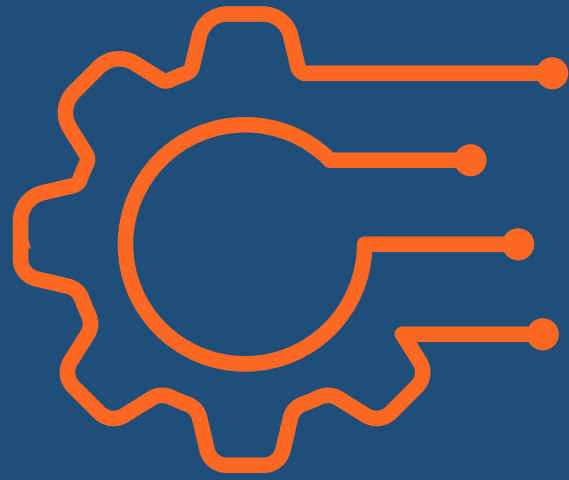
FORMER AGENCY OWNER

AUTHOR OF NANNY ABCS: THE SITTERS HANDBOOK

HOST OF HOW TO BUILD A CARE AGENCY PODCAST

INTERNATIONAL NANNY ASSOCIATION BOARD MEMBER

# WHO IS THIS FOR...



EFFICIENT



SAVE TIME



BELIEVE IN WORKING  
SMARTER; NOT HARDER.

# WHO IS THIS NOT FOR...



PEOPLE THAT HATE CHANGE OR  
CAN'T.



PEOPLE THAT LOVE THE LONG WAY.



PEOPLE THAT DON'T MIND OTHERS  
HAVE FOUND A BETTER WAY.

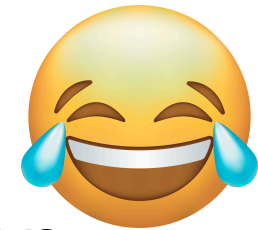
# THIS IS YOUR TIME...

# ...INTERACT

Use the Chat for  
Questions and  
Comments



Use the emojis when  
you looove an idea.



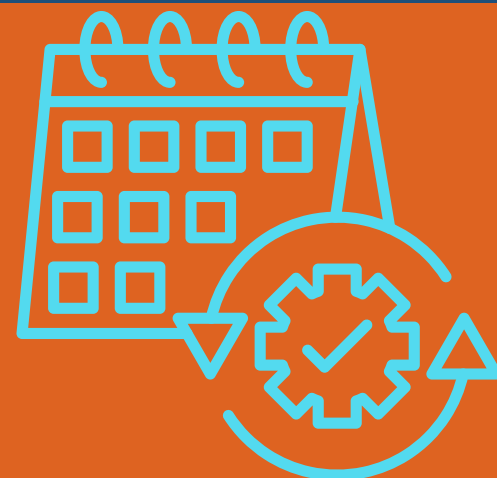
# WHAT IS A CRM AND ATS



CRM = CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM  
Helps manage client and agency interactions



ATS = APPLICANT TRACKING SYSTEM  
Manages candidate journeys



SCHEDULING  
For Matchmaking

# FEAR OF THE SWITCH

## FLEXIBILT Y

PEN AND PAPER = THE  
ULTIMATE IN FLEXIBILITY.  
YOU CAN TREAT  
EVERYONE DIFFERENT  
AND PIVOT ANY  
SECOND.

## HIGH TOUCH ?

IF YOU DON'T TYPE AN  
EMAIL FROM SCRATCH  
DO YOU REALLY CARE?

## MIND THE GAP

WILL OPPORTUNIES  
FALL THROUGH THE  
CRACKS?



# BENEFITS OF A GOOD SYSTEM

**2X YOUR BEST HABITS**

**FLEXIBLE WHERE IT MATTERS**

**SAVE TIME = DO MORE**

High touch = fewer  
clients, more time

**VS**

Streamlined = quality +  
quantity

## BEST OF BOTH WORLDS = ULTIMATE SERVICE MODEL

# MORE CRM ADVANTAGES



Spot inefficiencies and bottlenecks



Make your service transferable to your team



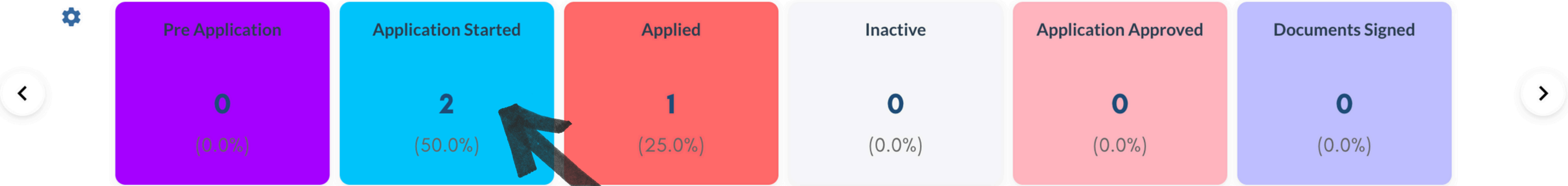
Build a business that runs with less human power

Search by Name, Email or Phone Number

+

📊

🔍





📅

WHY ARE PEOPLE STUCK HERE?

🔗

⚙️

🔄

<input type="checkbox"/>	Profile Picture	ID	First Name	Last Name	Email Address	Status	Phone Number	Last Updated	Tags	Types
<input type="checkbox"/>		1365273	John	Adams	jadamse@gmail.com	Application Started	+12345678910	Fri May 02 2025	Hospice Companion Infants	Chef PA Pet Care
<input type="checkbox"/>		1272164	Marty	McFly	mcfly@gmail.com	Complete	+14444444444	Sat May 03 2025	Medical Non Medical	Nanny Babysitter Housekeepi Chef PA Pet Care Organizatio

# **CRM ADVANTAGES = LIFE ADVANTAGES**

**Better Work  
Completed Efficiently =  
More Time For You.**

## DRAWBACKS:

Cost, learning  
curve, fear of losing  
personalization

## SOLUTIONS:

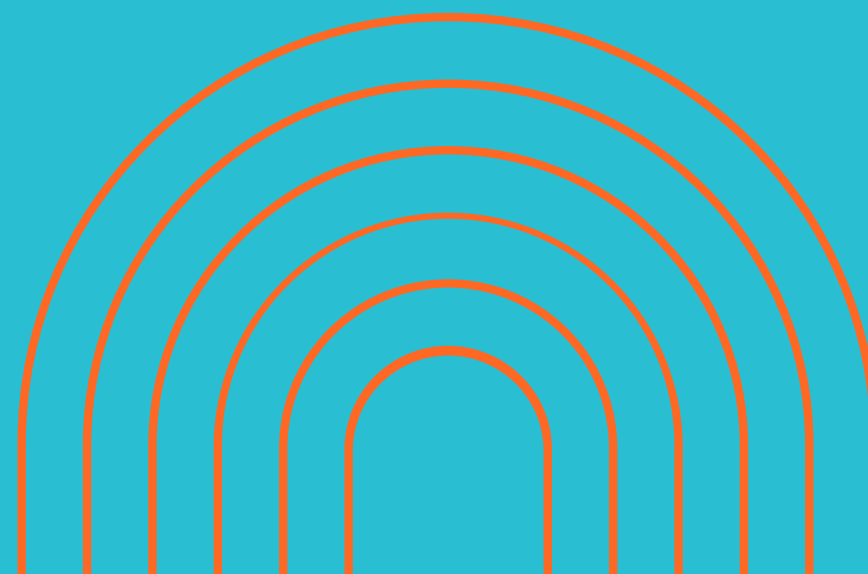
Choose flexible  
systems, invest in  
onboarding,  
tailor templates



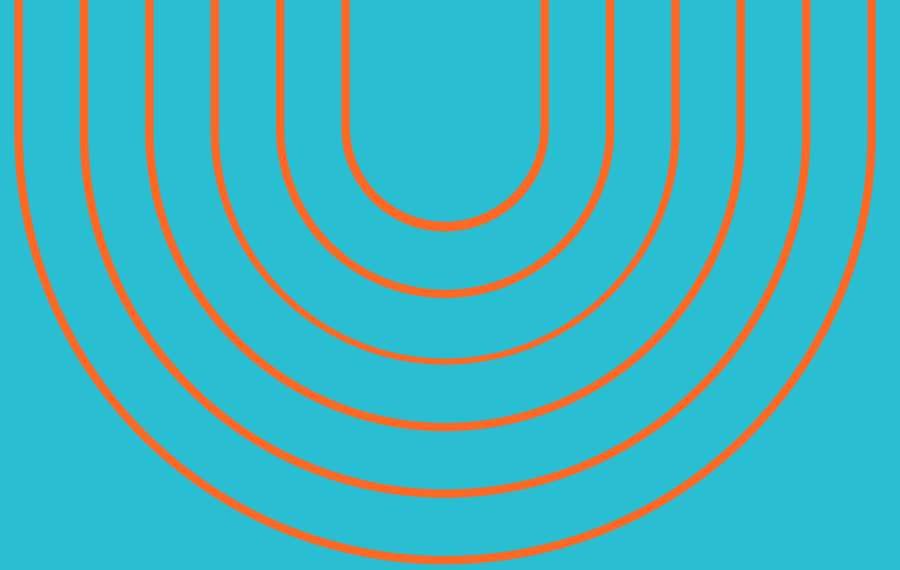
# HOW LONG DOES IT TAKE YOU TO WRITE AN EMAIL?

enginehire.io

nannytax.co.uk

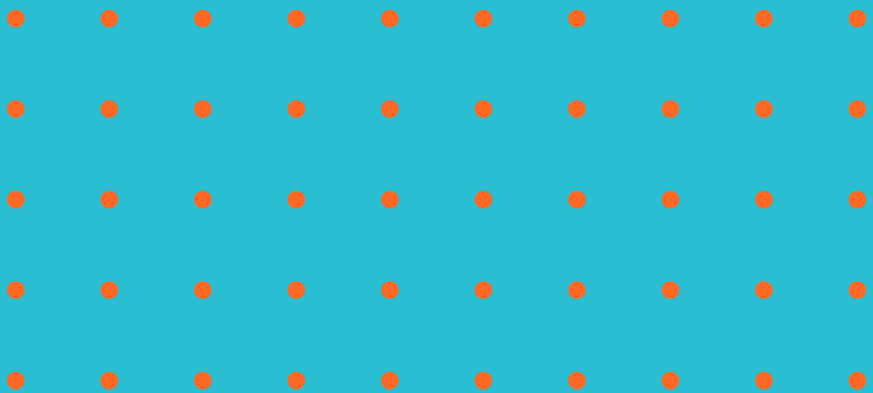


# HOW ABOUT ZERO TIME?



[enginehire.io](https://enginehire.io)

[nannytax.co.uk](https://nannytax.co.uk)





# EMAIL TIME SAVINGS

## OLD WAY:

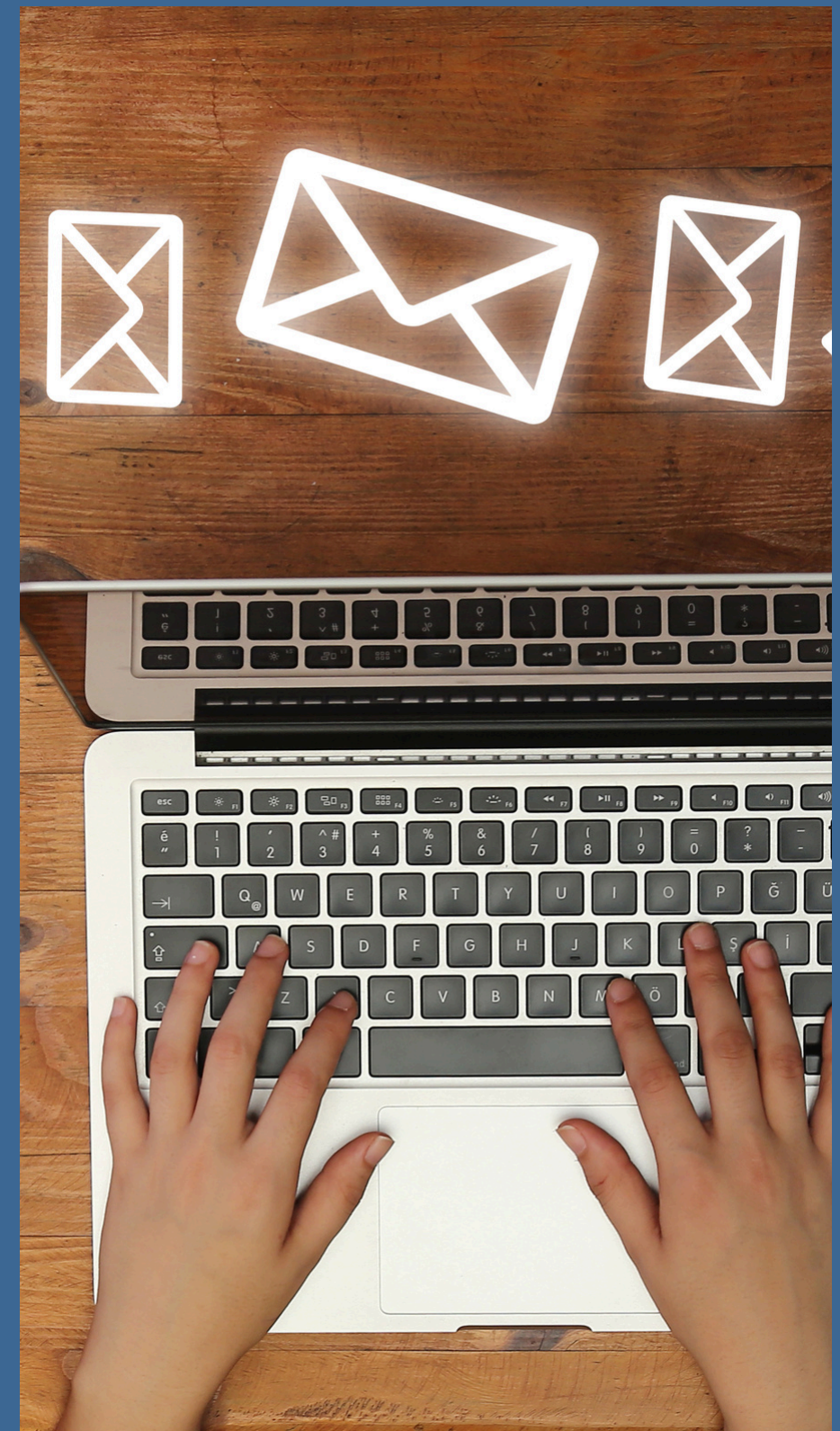
5 minutes per email  
10 emails = 50 minutes

## NEW WAY (10X FASTER):

0.5 minutes per email (thanks to pre-crafted templates)  
10 emails = 5 minutes

## TIME SAVED:

45 minutes saved for every 10 emails  
with the same personal feel,  
*just less effort.*





# Let's Do This Together

**Subject**

👍 Thank you for Connecting // A few more things.

**Body**

NormalPoppins-Regular16pxA[icon]BIBU[icon]

[icon][icon][icon][icon][icon]

Hi [[fname]]  
  
Thank you for taking the time to meet with me! It was a pleasure speaking with you.  
  
**The next things to do are...**  
  
1) [COMPLETE YOUR PROFILE](#)  
Note: The first time you login, your username and password are both your email address.  
  
2) ADD REFERENCES  
The sooner you add them, the sooner we can check them. \*Try to add their emails for quicker responses.  
  
Let me know if you have any other questions. I look forward to working with you.  
  
Best,  
Danny Rosenthal

AI ASSIST

[icon]

**Attachments**



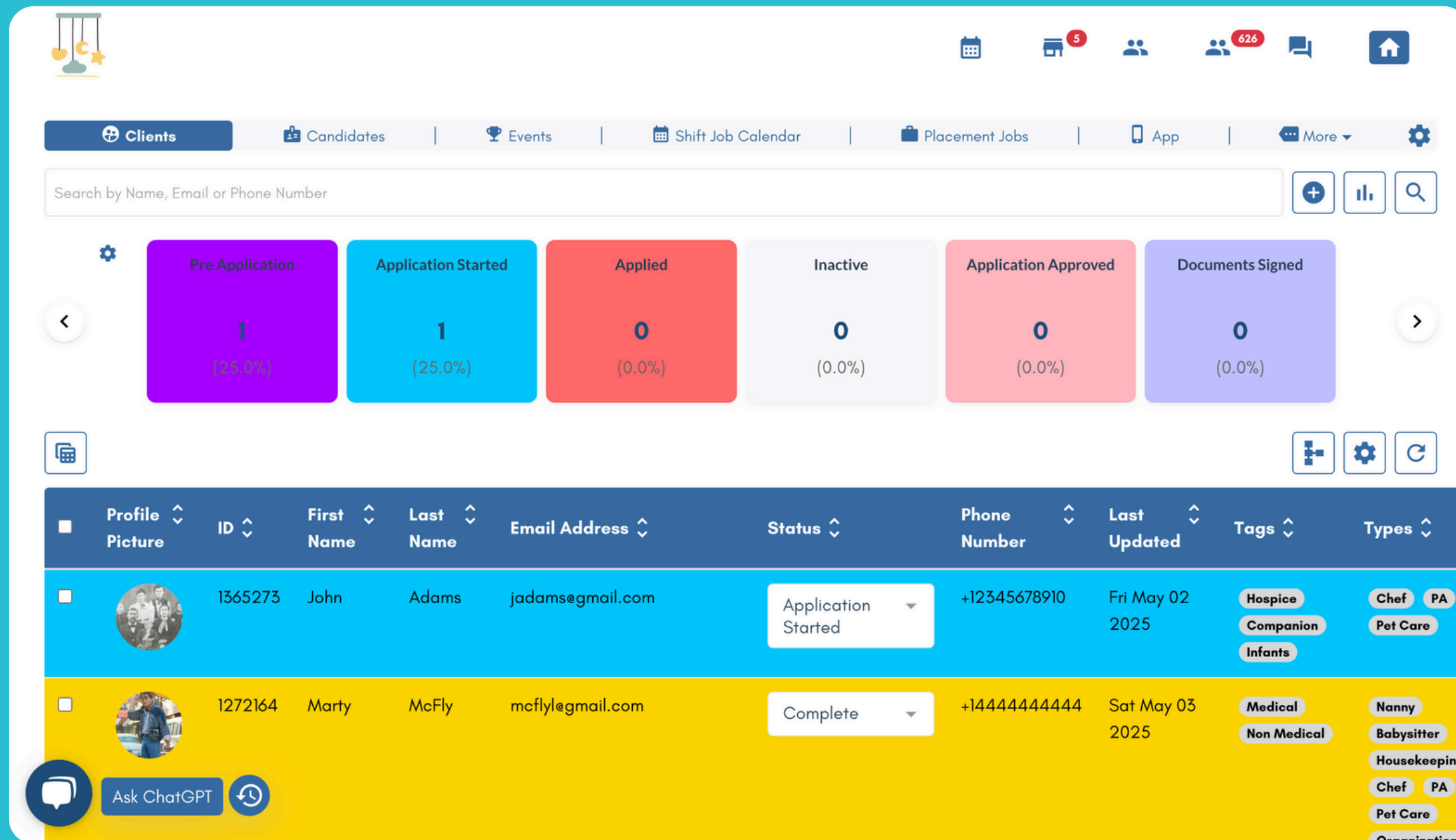
# Imagine your new, better workflow

## Freedom + Growth

Does This Sound Good to You?

**TREND YOU NEED  
TO KNOW**

# ABANDON CART



- Track those that have started an application but have never selected submit.
- Understand areas to improve the workflow. Where people get stuck.

## TREND YOU NEED TO KNOW

# REMINDER EMAILS

### Edit Template - Client Application Started Status Reminder

**Name \***

Client Application Started Status Reminder

**Type**

Client

Clear

**Trigger**

Status Reminder

Clear

If user stays in certain status for X amount of hours, it will automatically send this email

[Learn more about what all of the trigger options are](#)

**Status**

Application Started

Clear

**Select the time interval (hours, days, weeks, or months) to automatically send this email**

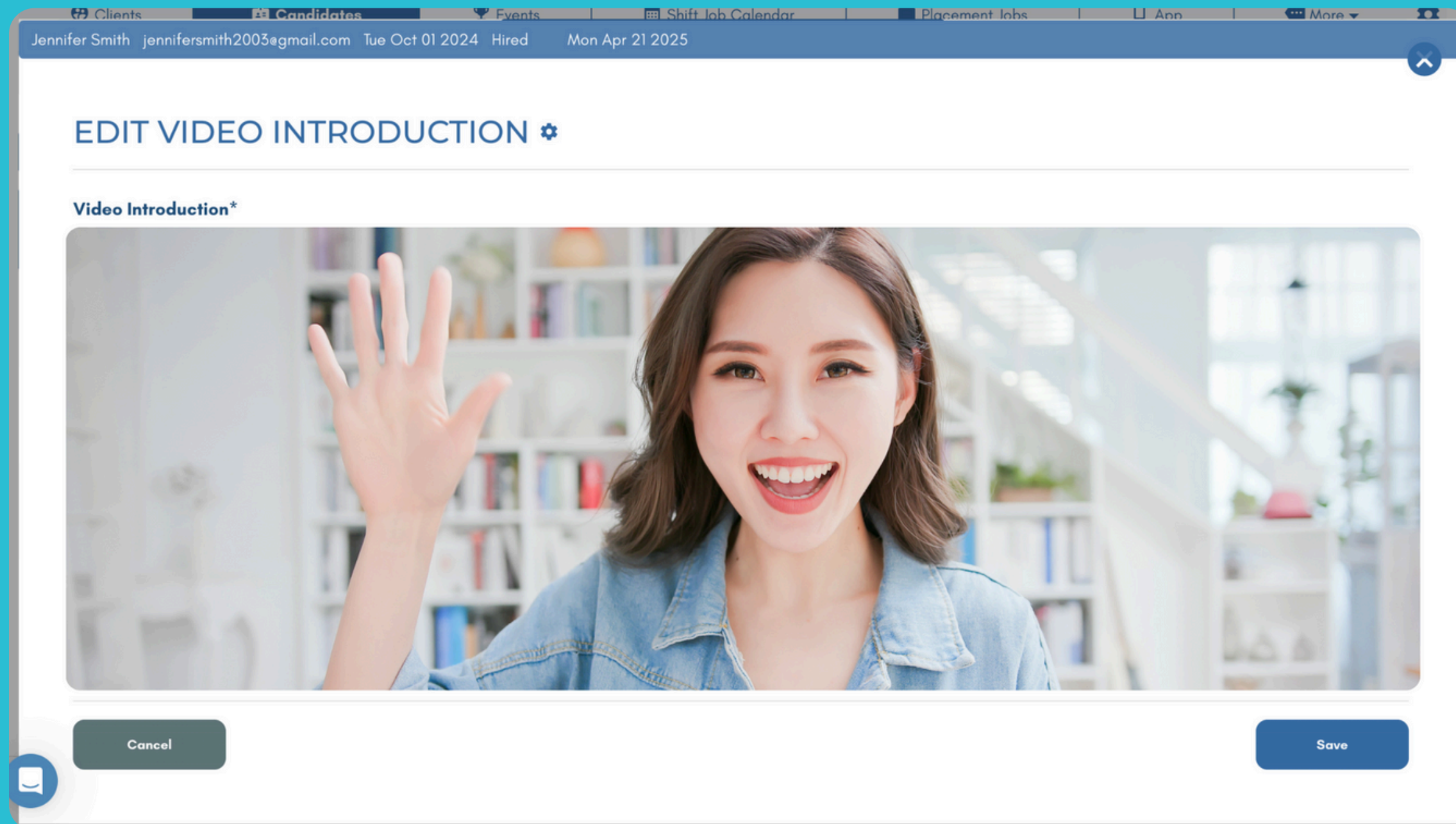
Hour

Update

- Following up is critical to success.
- Automate a process that continues to push Clients and Candidates to your finish line.

## TREND YOU NEED TO KNOW

# VIDEO INTRODUCTIONS



- Push HIGH TOUCH to the limit and use video for you to introduce candidates.

## TREND YOU NEED TO KNOW



# SIMPLIFIED MATCH SCHEDULING

×

THANKS FOR LETTING US KNOW YOU ARE INTERESTED!

The next step is for us to schedule a meeting with you and the candidate. Please fill in this form:

How would you like to meet?\*

In person

Please enter some dates and times when you are able to meet

Date

2025-05-08

Time

11:30 AM

+

2025-05-08

12:30 AM

+

How excited are you for this interview? \*

☆☆☆☆☆

Cancel

Submit

- How long does it take you to corrdinate a good time for your clients and candidates to meet?

## TREND YOU NEED TO KNOW

**You Can Start Right Now**

**No fancy software  
required**

**Just mindset and  
commitment to improve**



# THANK YOU

Visit [Enginehire.io](https://enginehire.io) to Learn More



Grab the Guide



Connect with Us

