SYMPHONY

Getting real value from your CRM with Client Sense

Client Sense

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pb Price Bailey
CHARTERED ACCOUNTANTS

Accounting firms across the world face a constant challenge with gathering, maintaining and enhancing their client and prospect data – regardless of the systems they use. Even if firms invest in massive data cleansing projects, unless there is a continuous validation process in place, the data soon declines in quality.

Chand Chudasama, Partner in the Strategic Corporate Finance team and Marketing Partner at Price Bailey had to solve the challenge of getting to the heart of the data he knew the accounting firm held. He turned to Symphony for a solution to automatically generate quality data and update the CRM from the firm's communications platform. Speed and accuracy were paramount, and the process had to be continuous, not a one-off exercise.

Chand said: "We were building and installing the CRM system but the underlying data was weak and the benefits of a CRM system might not become clear for a year or so. We wanted to get as much value as possible in that first year so that people would embrace the CRM. There was a concern that the data wouldn't be comprehensive, and I knew we had more prospects and clients than I was seeing centrally from our existing systems."

"Symphony enabled us to automate the collection of missing data elements with Client Sense so that the CRM was enhanced right away,' says Chand.

"The exciting thing is that once Symphony had integrated Client Sense into the CRM system, then we saw that the opportunity was even bigger.

"The core value of Client Sense is in the backend. It effectively sits on our Microsoft Exchange 365 platform harvesting data to populate our CRM system. That's the essence of Client Sense," says Chand.

Populating a CRM and data cleansing
The moment Client Sense is installed on Exchange, the software works behind the scenes tracking emails and meetings gathering real time statistics.

Chand says: "At the end of the first month I remember looking at Client Sense and I was very, very happy, it gave us exactly what we were after.

"The "must have" was to get the data automation feeding our CRM system. From the first few weeks we were happy that Client Sense would sit in the background, ticking away and adding value. That's really positive," says Chand.

By filtering which contacts to register in the CRM based on the frequency of emails this helped create a level of safety for the professional services firm.

Chand explains: "When data planning, we can filter Client Sense to only register contacts as part of a four-email chain, determining a real conversation. Certainly, with referrals and cross selling it's easier to say where there is more likely to be interest from a person because dialogue is happening. This is really valuable for us."

Price Bailey
CHARTERED ACCOUNTANTS

About Price Bailey

Award winning, top 30 accountancy and business advisory firm Price Bailey was in the process of updating records in its Client Relationship Management.

Services include:

Annual accounts and tax returns
Meeting your needs & helping you build your business

Bookkeeping services
Helping you take control of your day-to-day finances

Management accounts
Informing your decisions with management reporting

MiPB cloud accounting
Understand your business performance with the support of experts.

Chand describes how Client Sense gave Price Bailey the ability and confidence to continuously cleanse its database, saying, "With the CRM system fed by Client Sense we were happy to isolate contacts that hadn't engaged with us in over a year. We know we will get another 10k contacts through Client Sense which will be live and useful after the minimum of a four-email conversation.

"Our team managing database growth are much happier knowing we will get richer data coming through as a result of trusting Client Sense, which is really positive.," adds Chand.

Increase opportunities and stay compliant with live data
Chand highlights the opportunities for email marketing with the support of Client Sense, he says: "One of the ambitions for email marketing at Price Bailey is as a powerful and educational tool as well as a genuine source of bringing opportunities into the firm. Client Sense will be important to help achieve that."

Chand continues: "Client Sense is half the answer and CRM the other. We are expecting significant reform in the audit market and how we market to our audit clients may change. Live data on who is who within the client base, what type of client they are and what service they procure is vital. We are and continue to be a compliant marketing organisation in a highly regulated space. It's really important to have live data to stay compliant."

"There are also a few tangential opportunities around succession planning when someone leaves the firm. We've also had conversations with board members, our ethics partner and our HR team as data can be provided for HR to support teams that are over or under worked.

"Client Sense has changed our model and how we get value from our CRM system, there's no doubt about that," adds Chand.

Data-driven strategic capability
With real-time communication information you and your professional services firm can perform much more strategically to manage, protect and grow the relationships that drive revenue.

Contact Symphony – APS to book a Client Sense demo.

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Chand Chudasama,
Partner in the Strategic
Corporate Finance team and
Marketing Partner

About Symphony - APS

At Symphony we are relentless in our pursuit for new methods that transform Accounting Firms and their Clients

We aim to see the whole picture. We analyse, we work to understand all the issues that are holding you back.

Since 1999 Symphony has been partnering with Accounting Firms, initially in practice management software solutions and then CRM in 2012. Over time we have evolved to develop holistic, across-platforms expertise. It's a best of both worlds capability – mixing application software and technical disciplines with a consultative capacity to strategise for overall company systems.

When a firm's systems are truly integrated and access is easy across the organisation, teams have the means and freedom to build their all-important client relationships.

Technology Deployed

Client Sense
SymConnect – Integration Platform
SymphonyBPA – Automation
Practice Portal

Integrated to

Salesforce
Pardot
IRIS Practice Engine
iManage

Get in touch

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