GUIDE TO

IMPLEMENTING CRM IN YOUR FIRM

A BOOMER ADVANTAGE GUIDE™

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Contents

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Introduction

While most CPA firms agree that client relationships are essential, few invest the resources to ensure that the client relationship process is managed properly. Too often firms rely on a number of disparate back office systems to manage it, which results in redundant and inconsistent data.

Client relationships are the lifeblood of any accounting firm, however, and it is critical that they maintain an efficient, organized system to store client information.
A Customer Relationship Management (CRM) system is the most capable tool available to track and centralize this data while managing workflow and employee-related activities. Some of the more compelling benefits your firm can recognize by pursuing an initiative to implement CRM include:

A "One Firm" Concept

Progressive firms are moving away from operating as a "silo" practice in which select clients belong to a specific partner and are embracing the "one firm" concept in which all clients belong to the firm. To this end, CRM makes client information readily available to and promotes collaboration among all members of a firm.

A Business Development Culture

In order to thrive in today's accounting industry, firms must focus more attention on business development. The Sarbanes-Oxley Act lulled a number of firms into a false sense of security about acquiring new business. A firm that embraces CRM to standardize its sales processes will be ahead of those firms that do not. From a pre-sales perspective, CRM enhances cross-selling opportunities, new business acquisition activities and targeted marketing campaigns. After the sale, CRM streamlines follow-up communications with the client to solicit feedback and improve overall client service.

Standardize Processes and Track/Measure Activities

Even if firms understand the importance of adopting a business development culture, there will be no change in behavior without the capability to measure activities and results. CRM helps standardize processes and provides the ability for any employee to track and measure client activities, thus ensuring accountability for client service by everyone in the firm.

A Central Repository for Client Information

A CRM system is the central hub for data typically stored among a number of disparate systems. It presents this data in a user-friendly environment that can be acted upon. CRM enhances overall client experience by providing the firm's employees with the information to service clients in a timely and efficient manner.

Improve Workflow

A CRM system also offers workflow tools that enhance business processes and drive out inefficiencies. All firms can immediately benefit from these features.

This guide will help you analyze your firm's existing client relationship processes to identify areas for improvement. It also provides an overview of a CRM system, tools and techniques for managing implementation and success stories of firms that have implemented a CRM system and reaped the benefits.

Assess Your Firm

D.O.S. – Dangers, Opportunities & Strengths*

The first step to improving the client relationship process is to take an honest look at your firm's current practices.

Every organization has dangers, opportunities and strengths. Since all progress starts with the truth, it is critical to be brutally honest about where your firm is today and where it wants to be in the future.

Consider the R-Factor Question (or Relationship Factor Question*)—"If we meet again three years from today, what has to happen for you to be satisfied with the progress?" A good answer requires serious thought, honesty and a clearly articulated response. Completing the following D.O.S. exercise will help your firm identify its critical needs and develop a CRM system that focuses on the future.

Dangers

Complete the following form by listing all of your firm's client relationship dangers. After you have listed the dangers, list the reason(s) each is a danger. Then, as the final step, determine the top three dangers. This will require thought, discussion and consensus building.

Uncertainty	Reason	Top 3 Uncertainties
1.	1.	1.
2.	2.	2.
3.	3.	3.
4.	4.	
5.	5.	
6.	6.	
7.	7.	
8.	8.	
9.	9.	
10.	10.	

Common Dangers

- Client information is scattered among a number of disparate systems
- Sales and marketing processes are inefficient
- Sales opportunities are missed because of siloed information
- Client service is inadequate due to a lack of transparent communications

Opportunities

Complete the following form by listing all of your firm's client relationship opportunities. After you have listed these, list the reason(s) each is an opportunity. Then, as the final step, list your firm's top three opportunities. This will require thought, discussion and consensus building.

Opportunity	Reason	Top 3 Opportunities
1.	1.	1.
2.	2.	2.
3.	3.	3.
4.	4.	
5.	5.	
6.	6.	
7.	7.	
8.	8.	
9.	9.	
10.	10.	

Common Opportunities

- More efficient sales and marketing processes
- A single system for all client information
- Increased sales to existing and new clients
- Better overall client service

Strengths

Complete the following form by listing all of your firm's client relationship strengths. After you have listed the strengths, list the reason(s) you believe each is a strength. Then, as the final step, list your top three strengths. This will require thought, discussion and consensus building.

Strength	Reason	Top 3 Strengths
1.	1.	1.
2.	2.	2.
3.	3.	3.
4.	4.	
5.	5.	
6.	6.	
7.	7.	
8.	8.	
9.	9.	
10.	10.	

Common Strengths

- All employees are committed to client service
- High level of client satisfaction and repeat business from existing clients
- Comprehensive information about clients, opportunities and sales is available
- Partners are committed to the "one firm" concept

Congratulations! You have just completed an important step. All progress starts with the truth!

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Needs Assessment Questionnaire

Use this questionnaire to help your firm recognize the potential improvements in client relationship processes that deploying a CRM system can offer.

1. Our firm has multiple offices.	True	False
2. Our firm has multiple service offerings.	True	False
3. We would like a single source to quickly view/monitor activities related to important clients.	True	False
4. Our client contact information is scattered among various databases and individual files.	True	False
5. Our firm has numerous opportunities to cross-sell services.	True	False
6. Our firm needs a stronger business development methodology to increase non-recurring revenue streams.	True	False
7. Our firm has defined growth plans and objectives that are widely adopted.	True	False
8. Our firm would like to broaden its marketing initiatives, capabilities and efficiencies.	True	False
9. Managers in our firm would like to track their groups' business development activities.	True	False
10. Professionals at our firm are eager to develop their own practice areas and careers.	True	False
Total		

If you answered 'True' to five or more of these statements, it is almost certain your firm can significantly enhance its client relationship management by implementing a CRM system.

What is CRM?

Customer Relationship Management (CRM) as a practice varies depending upon specialization and industry, but it is typically characterized by all of the following:

Improved Client Relations

- Centralizes all contact information with key referral sources
- Encourages follow-up with new and potential clients
- Expands understanding of clients' needs

Enhanced Internal Management

- Establishes individual and group accountability for client management and service
- Connects multiple business offices to a common source of data
- Shares designated information among internal and external users

Expanded Business Development

- Enriches the sale of non-recurring services
- Facilitates easy engagement solicitation
- Maintains demographics information for each client
- Demonstrates leadership in thought and the adoption of new technology

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Why CRM?

CRM software offers a host of benefits that enhance the vitality of client relationships and business development. It simplifies the relationship-building process while maximizing sales opportunities. In addition, CRM software keeps bits of vital client information together in an easily accessible and searchable format.

The five most compelling reasons to adopt CRM software are:

Improve Business Processes

A CRM implementation forces you to analyze client relationship processes. This type of dissection reveals inefficiencies and redundant systems—information a firm can use to map out new and better processes. Make sure to choose a system for its fit with the firm's processes as well as existing systems and databases. Remote access and synchronization should also be available and easy to use. The system must be intuitive, or users will not adopt it.

Increase Efficiency

As your firm improves its processes and consolidates the number of tools and steps required to carry them out, it will become more efficient. A CRM solution provides a single location where communications with clients, vendors and partners are initiated and captured. This feature alone can save a great deal of confusion. For example, users can see who talked to a client and what they talked about—avoiding the potential embarrassment of repeating a conversation or trying to sell something that the client has already turned down. It is an investment in your firm's future and is certain to offer significant savings in time, money and efficiencies.

Boost Client Service

A single system with consolidated information ensures that important tasks or data do not fall through the cracks. As such, it enhances a firm's client relationship processes, leading to improved responsiveness and service that ultimately translate to higher client satisfaction. It is much less costly to keep an existing client than to recruit new business. And happy clients tell others, a reality that leads to referral business.

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While the sales, marketing and customer service departments are the primary beneficiaries, a CRM system will ultimately impact all parts of your firm as they work together to meet clients' needs and streamline processes. To achieve the benefit of transparent communication, CRM should be used and accessible by everyone in the firm.

Analytics and Reporting

Simply capturing client data within a single system is not enough. Your CRM system should make that data easily accessible and offer tools to analyze it once the data have been retrieved. CRM software can identify which services are most popular among clients or whether a specific client is being neglected. Users can also produce client or prospect lists without having to manually search a number of disparate systems.

Increase Revenue

The ultimate goal of implementing any new system is to increase revenue. The process review identified previously will help your firm establish business goals that can lead to increased revenue. Some examples of these goals include:

- Increase the number of products/services sold to existing clients
- Increase the number of new client wins
- Increase the number of new clients through referrals

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Key Steps to Implementation

Below are some of the most important steps to any successful CRM implementation:

A Balanced CRM Task Force

Developing a task force represented by people throughout the organization is the first step towards ensuring success. Four important areas of the firm that should be represented are:

Partners

Commitment from the firm's leadership is vital to the success of any initiative. Including someone from the partner group will keep other firm leaders interested and up-to-date on progress and milestones.

Internal Business Users

Those most familiar with the processes impacted by the firm's CRM initiative should also be included. Sales and marketing will be a part of this group, but it is likely that you will identify others during your process review. These individuals will provide critical input during the analysis and design phases of implementation.

Internal I.T.

As important as business users are those who understand the firm's I.T. infrastructure and existing systems. The resources they manage will be responsible for maintaining the application once implementation is complete, so they should have a thorough understanding of its underpinnings.

CRM System Expert (Internal or External)

Regardless of whether you select an expert before or after you choose a CRM system, this person can help you fully exploit the potential of your new CRM tool. Ideally, you want someone who has past experience with the selected application and its implementation. He or she can make suggestions and help the team apply the system to existing processes.

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Review/Improve Existing Processes

The task force should first complete a process review. A critical eye and questioning mind will help improve the firm's existing processes immensely. The CRM application should be configured to fit the newly refined processes.

Set Reasonable Milestones

The CRM system should address specific business needs. Split each of these into manageable milestones so that progress is visible, traceable and can be verified against requirements. Milestones ensure that the project stays on track and allow the CRM system to evolve over time.

Conduct Regular Reviews

Conducting a "post-op" after each milestone will enhance implementation as it moves forward. The task force should learn from its missteps and build on its successes.

Train and Communicate

End-user adoption is key to successfully implementing CRM in your firm, and training provides the roadmap to getting users on board. Instruct users how to work with the system, but also provide a reference document for self-help. Make sure to offer separate training sessions for key users to help them fully exploit the CRM system's rich array of features and tools.

Monitor

Tracking usage is also important to a successful CRM implementation. The task force should ensure that documented processes are followed. The leadership team can use management reports to hold staff accountable for using the application.

Adapt

If employees are not using the CRM system, it may be that it is not meeting their needs or the process is broken. It could also indicate that the user interface is not intuitive or initial training efforts were inadequate. Follow up and determine if you need to adapt the system, process or training to meet evolving needs. Most CRM systems have a number of features that permit the flexibility to make changes over time.

Key Considerations

Project Perception/Ownership

CRM implementation unites I.T. and business processes. As such, keep the following in mind:

- Although technical considerations are significant, I.T. staff cannot implement the solution alone. Encourage users who understand the firm's day-to-day business processes to offer input during design and development.
- On the flip side, business users cannot implement the solution alone. You need to ensure that I.T. resources are capable of complementing the functionality desired of the application before finalizing any plans.

Communication and Training

Like any initiative in the firm, clear and regular communication is critical to the success of a CRM implementation.

- Keep everyone informed about time and input requirements throughout the course of the project. This will ensure that key resources are available, end-user concern is limited and the firm grows increasingly comfortable using the application.
- Develop targeted training by organizational role to maximize interest and retention. An end-user's attention is related to the relevancy of the material to his or her job function. While there will certainly be firm-wide training topics, those better suited for specific employees should be conducted one-to-one.

Leadership Involvement and Promotion of Usage Standards

The involvement of at least one (and preferably several) management personnel during implementation is important to its success. This project champion should make end-user expectations clear and promote use of the application and its importance to the firm as a whole.

- **Users need to be held accountable** – Management should proactively review application usage by those who report to them. An "If it's not in CRM—it didn't happen" mentality should be promoted from the top down concerning all client communications and new business development efforts.

- **Expectations need to be clearly communicated and enforced** – Users need to understand what is expected from them and what previous routine reporting/review processes are being replaced, as well as the reports based on their usage of the application.

Understanding Functionality

Deliver a clear and concise scope of functionality upon release.

- **Phased Approach (logically defined and separated based on functional areas)** – Decide upon and adhere to requirements addressed throughout all phases. Features that will be addressed in later phases should not be presented to end users until they are comfortable with the functionality included in the current implementation phase.
- **Push wish list items into subsequent phases** – New requirements and needs may arise during design and development of the current implementation phase. Small requests can quickly expand into a large list that will consume resources. You can add these features later, but stay focused on the implementation phase at hand.

One Page Plan

STRATEGIC OBJECTIVE	MEASUREMENT	STRATEGY/INITIATIVE	DUE DATE	ASSIGNED TO
1. Complete a client relationship management assessment program.	• Process improvement opportunities identified • New process flows documented • Requirements document developed	• Develop a CRM task force comprised of both business and IT professionals. • Break down existing CRM processes/systems and analyze them for process improvements. • Conduct a GAP analysis of existing processes/systems and desired functionality. • Rebuild processes and document the process flows. • Develop requirements document and prioritize necessary features. • Share requirements document with employees to solicit confirmation and feedback.	May 15, 200X June 1, 200X June 15, 200X June 30, 200X July 15, 200X July 31, 200X	CEO CRM Task Force CRM Task Force CRM Task Force CRM Task Force CRM Task Force
2. Research, analyze, select and implement CRM solution.	• Requirements communicated and sufficient support exists in the firm • CRM solution selected • CRM implemented	• Research potential tools/vendors and develop a "short-list." • Develop & distribute an RFP based on requirements document & conduct vendor presentations. • Select vendor and negotiate price. • Hire a third-party expert on the selected solution to guide the implementation. • Develop an implementation plan and execute.	August 15, 200X August 31, 200X September 15, 200X September 30, 200X October 15, 200X	CRM Task Force CRM Task Force CRM Task Force CEO/CRM Task Force CRM Task Force
3. Train the firm on using the chosen CRM solution.	• # of inquiries to help desk • % of firm that supports the CRM initiative	• Identify champion(s) to recruit supporters and train end users on the chosen CRM solution. • Develop training guides, FAQs and other reference material. • Conduct firm-wide training sessions. • Conduct desk-side training sessions on a one-to-one basis. • Solicit feedback and suggestions for improvement in training from end users. • Monitor training program and adapt if necessary.	October 31, 200X October 31, 200X November 15, 200X Ongoing Ongoing Ongoing	CRM Task Force CRM Champion(s) CRM Champion(s) CRM Task Force CRM Task Force
4. Monitor CRM processes and user adoption and make continuous improvements.	• # of features or additions • % of firm adhering to new processes within system	• Develop standards/measures for user adoption and commitment to new CRM solution. • Build standards/measures into the performance review process. • Continually solicit feedback and suggestions for process/system improvement. • Capture, prioritize and assign due dates to suggestions. • Implement process/system improvements.	October 31, 200X November 15, 200X Ongoing Ongoing Ongoing	CRM Task Force CEO/HR CRM Champion(s) CRM Task Force CRM Task Force
5. Improve customer relationships.	• Increased client satisfaction • Client retention rates • Increased # of leads/opportunities generated for existing clients • # of referrals from existing clients • # of new clients	• Develop, distribute and monitor a client satisfaction survey using a CRM solution. • Monitor/track client retention rates in CRM. • Develop & implement a referral program with incentives for existing clients. • Develop marketing campaigns to develop new business with existing and new clients. • Develop a customer appreciation program using CRM.	November 30, 200X Ongoing December 15, 200X Ongoing December 15, 200X	Sales/Marketing Sales/Marketing Sales/Marketing Marketing Marketing

BENNETT BT THRASHER

Bennett Thrasher PC is one of Atlanta's largest, full-service certified public accounting and consulting firms. Founded in 1980 by Rick Bennett and Ken Thrasher, Bennett Thrasher has a dedicated, experienced team of sixteen shareholders and more than 100 professionals.

Note: Parts of the following are excerpted from "CRM: A –Z" by Liz Gold in the June 16, 2008 edition of Accounting Today *(used with permission).*

Situation

For most of its history, **Bennett Thrasher PC** used a billing system to manage its client relationships. Contact information and selling data were spread throughout the firm among its many employees and databases. This reality made it significantly difficult for the firm to plan and execute critical client relationship endeavors. Mailings, for example, required months to organize and send. "Mailings were nightmares," Jennifer Loftin, Marketing Manager, said. "We were pulling from several different contact lists."

In 2003 the firm began to explore the idea of a CRM system to centralize its large contact list and streamline communications. "We never really had a good marketing database that we could use," Greg Kosinski, COO, said. "We've never had a consistent, one-stop-shopping list of clients or referrals, and we've never had a consistent list that was updated. Everybody had their own individual lists." Kosinski and other leaders at Bennett Thrasher also wanted to get a handle on the mass of records related to clients, referrals, alumni and vendors spread out among the firm's employees.

To get started, a task force comprised of Kosinski, Loftin, an outside technology consultant and Chris Gilligan, the firm's I.T. manager, met every week to review processes, gather requirements and begin searching for the best software.

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Each person had a different role throughout the process.

"As the marketing manager, I brought in the view of, 'How am I going to use this tool to capture leads and prospects and use it in a business development sense, as a tracking tool for marketing campaigns—as well as pulling data back out to assist partners and managers with any information they need?'," Loftin said.

"From an I.T. standpoint," Kosinski added, "Chris's part of the whole thing was to make sure the system was available, up and running and we didn't have any issues. Because he touches all departments in the entire firm, he has a lot of input as far as what he sees the needs are in various departments. My role was to oversee the process and to help get the information that they needed from everybody in the firm."

Solution

Bennett Thrasher sought out a solution that would serve as a centralized data source encompassing clients, contacts, referral sources, prospects, associates, alumni and vendors. The firm additionally wanted to track marketing correspondence and campaigns, leads, proposals and anything else related to the client relationship process.

The task force decided upon Microsoft Dynamics® CRM because of its "easy learning curve" and integration with Microsoft Outlook®. "It looks just like a part of Outlook," Kosinski said. "It's so similar that there's not a lot of training involved." They divided implementation into four phases and assigned themselves as testers during the initial phase.

Implementation and Customization

Bennett Thrasher quickly discovered that customizing Dynamics CRM to meet its needs was much easier than anticipated. "[Dynamics] CRM is easy to customize, [a fact that] has lowered the learning curve," Loftin said. Because of that, the firm has been able to focus on using the software to perfect and standardize many of its processes. "We are working hard on building strong processes around [Dynamics] CRM as we have grown so fast," Loftin said.

Bennett Thrasher was also impressed at just how far they could go when finalizing the initial customization. “There were certain things we could shut off in the system, so visually you wouldn’t see it,” Loftin said. “We added services so we would know what kind of services [prospects and clients] were interested in or receiving from us. We added industry areas where we can identify what industries prospects or clients are involved with. We had the flexibility of how referral sources were captured.”

Training

Because of its significant similarities to Microsoft Office®, Bennett Thrasher found the training process to be simple and straight-forward. “[Dynamics] CRM is so seamless with Outlook, and that is the major reason we chose it,” Loftin said. “The transition has been easy with training.”

Collecting and cleaning up the data also took a lot of time — more than 18 months — a process coordinated by Gilligan. Sixteen shareholders and 35 managers were asked to sort their data into client, referral source, prospect or personal categories, which were later put into Excel for culling. When the group came across a personal contact, it was tossed to the side.

“Everybody was very different on how they kept their contact records,” Loftin said. “Some were very precise and detailed, and for others it was a first name and a phone number. We had to eliminate duplicates. We did it by brute force, and that’s what took the bulk of the time for the project.”

Benefits

Bennett Thrasher culled its list of 20,000 contacts to 4,500. As a result, the firm can now easily send e-mails to targeted distribution lists. “It was the first time we were able to do those things without putting a ton of effort into it,” Kosinski said.

The firm is also making strides in organizing its data so that any employee can quickly access critical client information, either at the office or in the field. Dynamics CRM pays off by getting information into the right hands at the right time.

“One of the problems that we run into as a firm is, say a shareholder is out in the field and he or she is speaking to someone about a potential job,” Kosinski said. “Right now it’s hard to know if other shareholders know something about the prospect’s company. We don’t have a good way right now of identifying those relationships. But once we start setting them up in [Dynamics] CRM, it’s as easy as a click.”

Conclusion

Dynamics CRM has made a significant impact on the way Bennett Thrasher conducts business. By centralizing its contact list, organizing communications and standardizing processes, Bennett Thrasher has made significant strides in efficiency and effectiveness. For more information about Bennett Thrasher, visit www.btcpa.net.

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Certified Public Accountants and Consultants

With more than 45 professionals in three offices, **Templeton & Company, LLP**, ranks among South Florida's top accounting firms. Its practice encompasses traditional disciplines such as audit, assurance, tax and financial planning, as well as an array of consulting services (including a technology practice). Its clients span diverse industries, including non-profit, construction, agriculture and distribution as well as high net-worth individuals.

Situation

Templeton & Company, LLP prides itself on being its clients' most trusted advisor. The firm is fully aware of the critical role that client relationships play in its success and treats its clients with utmost priority and care. Chris Gryskiewicz, CPA and Executive Vice President, is directly involved in key business development activities across all service lines. He understands that successful growth requires the firm to garner relevant insights on its current and potential clients and engage everyone in the firm in the process. Gryskiewicz and managing partner, Steven Templeton, CPA, CVA, recognized that the firm needed a centralized technology infrastructure to create a business development culture in the firm.

As an experienced Microsoft Gold Certified Partner, Templeton & Company recognized that a properly configured and implemented CRM system could serve as its "central nervous system." In order to achieve, manage and sustain its growth as well as serve its clients in an increasingly competitive environment, gain consistency in its business processes and create organizational efficiencies, Templeton & Company implemented a CRM system to:

- Manage its sales process and pipeline
- Quickly build targeted, actionable lists and handle marketing activities
- Provide relational information on clients, prospects and referral sources
- Improve visibility of client activities
- Be easy to use and accessible to everyone in the firm

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- Standardize the firm’s business processes
- Facilitate collaboration and manage documents
- Support the firm’s recruiting process
- Tightly integrate with Microsoft Outlook (its email system)

Solution

In 1997, Templeton started its technology consulting division by becoming a Microsoft Dynamics Partner. Several years later, one of the firm’s top technology consultants served as an alpha tester for the initial launch of Microsoft Dynamics® CRM.

Templeton decided to be its own “client” and design, configure and implement the client relationship management system internally. The program combines internal data about people, companies, relationships, experience, and even integrates with the firm’s billing system and marketing campaigns. Using a firm-wide program made relevant data residing in time and billing, HR, practice management, document management and other enterprise applications available to all users. Templeton captured and consolidated relevant information about clients, prospects, and referral sources in a central repository that is easy and intuitive to navigate. The application’s workflow tool standardizes regular communications, marketing, and business development efforts, as well as orchestrates the delivery of client engagements.

As an accounting firm, Templeton also needed a program that could accommodate its unique need for security, privacy and ease of use. Dynamics CRM accomplished this for them.

Implementation and Configuration

Dynamics CRM was configured to meet all of Templeton’s internal needs as well as those of its clients. The firm’s successful implementation and configuration of the software sparked an initiative to offer it to other CPA and professional service firms.

Templeton configured Dynamics CRM to capture data that strengthens existing relationships while simultaneously providing demographics for marketing efforts. Some marketing campaigns can be executed among existing clients in a cross-selling scenario, while others are targeted as leads and prospects. In both cases, the campaigns generate specific opportunities for new and additional services which are managed through a standardized sales process using customized workflow routines. At any given point management can see a snapshot of the sales pipeline and assess the health of the forecast.

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The firm's marketing director, Sarah Templeton, remarks, "Being the only full-time marketer in the firm, my time and resources are limited. Using the powerful, automated features in Dynamics CRM, I can facilitate, track and measure the results of every campaign."

Once an opportunity becomes a new engagement, the application captures data relevant to the execution and history of the service provided. At this point the workflow engine is invoked again to manage the processing of the engagement and task all parties necessary for the standardized execution of the particular service. At the engagement level, the application is integrated to other Microsoft technologies like Microsoft Office SharePoint® (collaboration and document management) and Microsoft Dynamics SL® (ERP/Billing) to provide users with an all-inclusive view of the engagement throughout its life cycle.

Templeton is proud of how its culture has evolved around the client-centric program. "Everyone in the firm uses Dynamics CRM, making it an indispensable backbone of our firm's infrastructure," Gryskiewicz said. "Unlike other CRM offerings, it's intuitive and easy to use; our staff loves it. It readily adapts to our firm's needs and business processes while integrating with other mission-critical systems. As pleased as we are with Dynamics CRM now, we believe that its value to our firm will continue to grow in the future."

Training

With Dynamics CRM running on everyone's desktop, Templeton conducts routine training for all users during firm-wide weekly meetings. In addition, ad-hoc training sessions are held by power users at the department level to build consensus and comfort with the application concerning a specific service line. New employees receive a training manual, and the firm's support staff answers questions as they arise day-to-day.

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Benefits

Dynamics CRM has helped Templeton gain insights into its clients and opportunities and support the goal of becoming its clients' most trusted advisor. The firm communicates consistently and effectively to its clients and prospects while demonstrating leadership in practice areas.

"Our purpose is not just to win the engagement, but we also want to be seen as experts in the field to both our clients, recruits and the community in which we practice," Gryskiewicz said. "With Dynamics CRM, we have standardized our sales processes and focus on the opportunities that we have the highest probability of winning. The program has also allowed us to collaborate among disciplines and team members, so we can strategize our approach to speak to clients' and prospective clients' specific issues or opportunities. It is our single source to monitor sales and marketing activities, manage client relationships, support staff recruiting efforts, track client projects and due dates, facilitate collaboration among professionals and manage documents. It also upholds the 'one firm' practice philosophy and has helped drive our firm's culture."

Single source for all client information

Dynamics CRM has become a dashboard for all day-to-day business processes by providing not only CRM specific data in a simple-to-use format, but also links to other critical applications such as SharePoint. Users can access all necessary information and functionality from a single application and login.

Breaks down traditional silos of information in a professional services firm

Client contact and engagement information is now owned by the firm instead of an individual, and although a single user is still designated as the "primary manager" for a given client relationship, all data is shared throughout the firm. This eliminates the need to manually share data back and forth, and users understand and appreciate the ability to "self-serve." Users are empowered to locate, review, and react on the information provided by the application.

Integrates with billing, HR and marketing programs

At the engagement level, users can track and review billing information during the course of the delivery of a given service/project to assess budget vs. actual. Recruiting, a mission-critical process for professional services firms, is managed and activities related to the hiring process are tracked within the system. As a result, hiring decisions involve multiple individuals sharing comments and opinions regarding the acquisition of new talent. Marketing programs are targeted based on demographic data collected in the application and feed the sales process by discovering new opportunities within the existing client base as well as new leads and prospects.

Standardize business development and client servicing processes

As the firm identifies new opportunities, the application automatically generates a set of tasks necessary to close new business. These tasks are assigned to appropriate individuals (based on the type of service) responsible for performing the action. As tasks are completed, metrics like probability and sales stage are automatically managed by the workflow engine resulting in a reportable pipeline. As new services are agreed upon, workflow processes generate the tasks necessary to process necessary activities and provide completion and accountability metrics at the engagement level.

Conclusion

Templeton set lofty goals for its CRM implementation and, thanks to the Microsoft platform, is realizing its vision. It has tailored Dynamics CRM to fit its specific needs, most of which are common to all CPA and professional services firms. Templeton now has significantly more actionable insight into its clients, competitors, and prospects—making the firm a more effective competitor in the marketplace.

For More Information

With offices in New York and Florida, Templeton Consulting focuses on providing technology consulting and implementation services to organizations throughout the U.S. Templeton Consulting is a division of Templeton & Company, LLP and is a Microsoft Gold Certified Partner. An award-winning solution provider, Templeton has been recognized by the Microsoft community for being a leader in providing innovative and agile business solutions to its clients. For more information about Templeton Consulting solutions, call (866) 558-7816 or visit www.templetonco.com.

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Based in Manhattan, Kansas, **Boomer Consulting, Inc.** (BCI) is the leading provider of strategic planning and technology consultation to the accounting industry. BCI employees engage frequently with clients (including top firm leaders) to provide strategy and technology recommendations and assess the execution of firm technology plans.

Situation

BCI endeavors to earn trusted advisor status concerning strategy and technology initiatives with all of its clients. The firm delivers multiple services including on-site engagements as well as group-based, multiple firm conferences. Effective client communication is crucial to BCI's success, a fact that compels the firm to regularly evaluate its client relationship processes and systems.

BCI was using an outdated, limited client information management application to manage client profiles and track contact history. Although the existing application was adequate for a time, additional company and industry specific processes as well as functions could not be addressed because of its functional limits. The need to better manage its client processes and execute on collected data compelled BCI to implement a new customer relationship management solution.

"Although we conducted a thorough review of our client relationship processes when implementing the old system, we outgrew that application's capabilities in just a couple of years," Jim Boomer, CIO, said. "We regularly went outside the application to accomplish tasks using spreadsheets and other tools. This led to redundant and inconsistent client data. We were also looking to improve our sales process, marketing campaigns, event management and overall client service. We knew there was something better out there, so we decided to search for a new solution."

Solution

While serving as an expert on firm strategy and technology, Boomer Consulting, Inc. also pays close attention to its clients' success stories and learns from them. After hearing several positive endorsements from clients who had either implemented or were in the process of implementing Microsoft Dynamics® CRM, BCI began a requirements initiative to see if that application might also be a good fit for its needs.

BCI selected Microsoft Dynamics CRM, a full-featured and flexible client relationship management solution that automates and integrates sales and client service processes. Its seamless integration with Outlook and the intuitive Microsoft interface were among the most compelling features that attracted BCI to the product. "We liked that its look and feel mirrors Microsoft Office," Boomer said. "We felt this would minimize the hurdles to user adoption as well as the amount of training required to get us up and running." BCI also liked how Dynamics CRM simplifies a number of sales and marketing routines, increasing the efficiency of employees in those departments.

To customize and implement the new system, BCI sought out Templeton Consulting, a leading Microsoft Gold Certified Partner and value-added reseller for Dynamics (formerly known as Microsoft Business Solutions). "Based on our relationship with Templeton and discussions with clients who had partnered with them to implement Dynamics CRM, we were confident in their expertise," Boomer said. "What really put Templeton Consulting over the top, though, is its roots as an accounting firm. We knew they understood our business and clients."

Implementation and Customization

Templeton consultants worked closely with the BCI CRM task force to build upon technical and user requirements developed during the software selection phase. By starting with CRM for Professionals, a customized Dynamics CRM implementation offered by Templeton, the system was catered to BCI's needs with ease.

Because BCI also hosts meetings throughout the year, keeping track of sales and registration information is highly important. Dynamics CRM significantly reduced the amount of manual work required during these processes. Dynamics CRM was also easily configured to match BCI's company language.

Training

Templeton provided in-house training for the entire BCI team at its Manhattan, Kansas office, and by phone and online for remote access employees in Kansas City. Extensive training was not required because BCI employees have been using Microsoft Office products for years. As such, instruction was centered on helping BCI employees unleash the rich array of features available in Dynamics CRM. Most topics addressed process changes and tips for leveraging the application to complete tasks in a more efficient manner.

Templeton has continued to work closely with Eric Benson, CTO, to offer ongoing support. Benson acts as the internal CRM "champion," and Templeton provides the assistance he needs to amplify the BCI team's understanding of Dynamics CRM.

Benefits

A year after launching Dynamics CRM, Boomer Consulting, Inc. has already recognized numerous benefits. BCI's most frequent users of Dynamics CRM comment about the features that make their jobs easier:

Dynamics CRM works the way we do

The seamless integration with Outlook and SharePoint allows BCI employees to use an interface with which they are accustomed. Since Dynamics CRM plugs directly into Outlook, users don't have to run another application. At the push of a button, email communications within Outlook are tracked in Dynamics CRM. Similarly, when a client record is opened from the application, users can see directly into the client folder in SharePoint. This familiarity with the user interface made Dynamics CRM easy to learn and straightforward.

Information at your fingertips

BCI employees previously spent a great deal of time looking for client information in a number of disparate systems and manually consolidating the information to accomplish tasks. The Dynamics CRM system pulled all of that information into a single location. Using the client search feature, all information needed to determine influencers and decision makers is merely a click away. The ability to configure forms has also provided users with more relevant information in a single screen.

Streamlined sales and marketing process

Dynamics CRM has also streamlined the sales and marketing process at Boomer Consulting, Inc. Users can now follow the sales cycle from the initial point of contact to the signing of the contract and better manage sales opportunities and follow-up activities. The customized search and reporting functions allow users to create client lists based on specified criteria and target marketing materials to the appropriate audience. The depth of functionality and flexible configurations in Dynamics CRM also allow the sales and marketing team to continually make improvements to their processes.

Improved client relationships

"Client relationships" is one of the core values of Boomer Consulting, Inc. As such, every employee in the company is committed to ensuring that clients are satisfied and their expectations are met. Every area of the company is impacted by the information available in Dynamics CRM, and elements of the system can be used by everyone to make them more efficient in serving clients. For new employees, the communications history makes prior correspondence with clients easily visible—ensuring no duplicate or unnecessary communications are issued.

Conclusion

At Boomer Consulting, Inc., Dynamics CRM is now a critical part of day-to-day operations, and the firm continues to enhance its system on an ongoing basis. BCI has also identified additional opportunities for process improvement that it might not have even considered had it not implemented the new solution. "We've only just scratched the surface of the functionality offered by Dynamics CRM, and we are already light years ahead of where we were with our old system," Boomer said. "We have become much more efficient, and we now know a whole lot more about our clients than we did two years ago."

For more information about Boomer Consulting, Inc., visit www.boomer.com.

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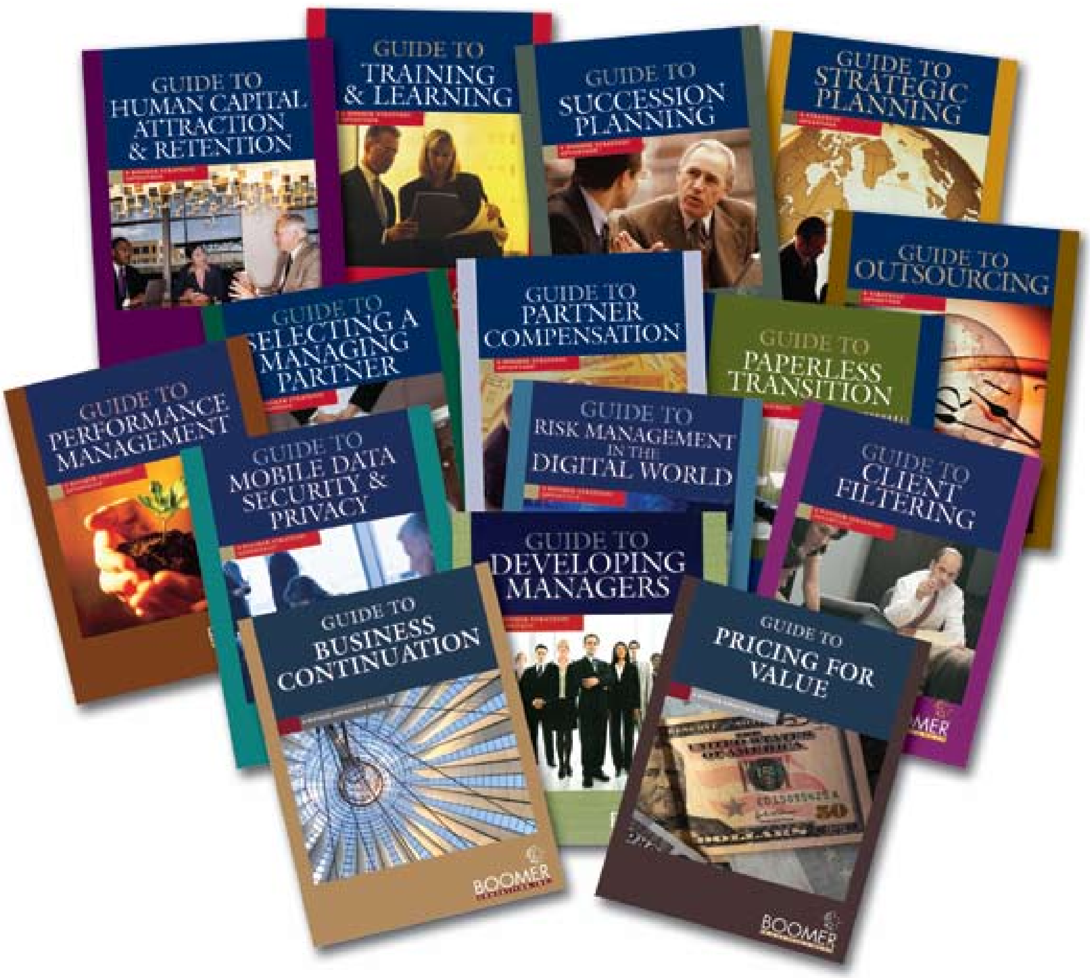

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