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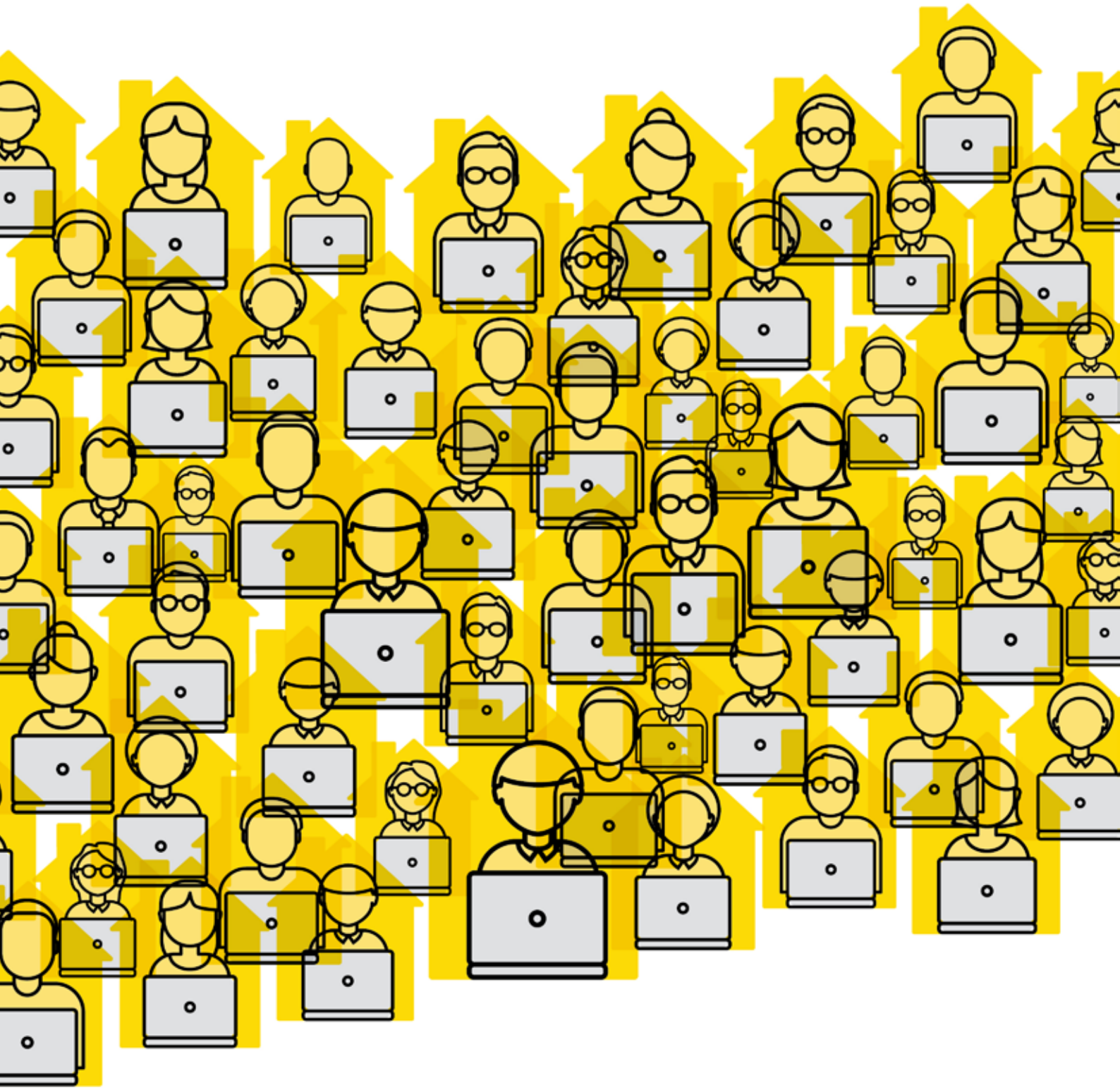

*accountants in it stimulating collaboration*

december 2020

# How to get strategic management information with no effort

*Within days after installation Client Sense is helping your firm manage, protect and grow the relationships that drive revenue.*

**Whilst this year has set challenges that no one could imagine, the accounting sector has battled through, rethinking strategy, and accelerating digital transformation. Firms have adapted and are coping. As we approach the end of this year, let's move forward and start 2021 afresh. So, how can your firm hit the ground running with a business growth strategy that strengthens and builds on what you have already set in place?**

Cleansing data is a good place to start. A data-driven solution can provide your firm with the edge giving you the vital insight into key relationships that are essential for business growth. Here's how you can achieve quality data without lifting a finger to data input.

## Real-time data cleansing

Data cleansing is a chore that no one enjoys, but with a swift installation of Client Sense it is automatically done for you. From the moment the solution is installed (we install the solution quickly and remotely) the software works behind the scenes tracking all emails sent out from your firm and monitoring the reply traffic.

Its real-time functionality means Client Sense starts to gather statistics from the minute it is installed on your email exchange. So, in just a few weeks Client Sense has accrued enough data to deliver meaningful management information on client and referrer communications. This data driven; relationship intelligence insight is crucial for a successful business growth strategy. What's more, you gain this knowledge from Client Sense just ticking along in the background with no input required from partners.

## Immediate visibility to grow key relationships

Within days after installation Client Sense is helping your firm manage, protect and grow the relationships that drive revenue. The easy to use exports based on current activity allow your relationship managers or marketing and business development teams to have the data they need to identify more opportunities, improve client retention, manage referral sources, improve cross-servicing capabilities and revisit dormant clients. Client Sense gives marketing access to contacts' email addresses which may not be updated in a Client Relationship Management (CRM) system and would previously get overlooked for cross selling and marketing campaigns.

For example, in the event of a planned or unplanned unavailability of an employee, you can quickly identify external relationships most likely to be impacted. Then you can identify who else in the firm knows the same contact and may be able to maintain the client or referrer relationship.

Client Sense can identify external staff changes on your client side that may impact your ongoing commercial relationship. Acting on this information can help you to protect the client relationship before it strays. You can also leverage this knowledge and act quickly if an external contact changes organisation. This potentially opens a new and welcome opportunity for the firm to engage with the contact at the new organisation.

Client Sense quickly identifies cross-servicing opportunities based on prior contact. You can then assess the best contact internally to make an introduction and identify where these beneficial introductions have and have not been made.

Relationship managers can clearly see key clients, prospects or referrers assigned to them. For each of these key relationships, a contact threshold is set, and because Client Sense is automatically connected to your firm's email systems these are identified in yellow or red as they border or breach those dates.

For practices either in the process of choosing a Client Relationship Management (CRM) system or firms with or without a CRM already installed, Client Sense provides a complementary software solution for professional services firms.

## Data-driven strategic capability

With Client Sense you can rest assured that you and your team, even when working remotely, know who is in contact with who. With real-time communication information you and your firm can perform much more strategically to increase and maintain revenue.

If you are interested in discussing how you can enhance your firm's business development capabilities, please contact the team at Symphony for a Client Sense demo.

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