gathering dust?

CRM, or Customer Relationship Management, is all about using a software program to identify and source leads for potential business or even potential referrals. I am most familiar with SageCRM because I have more clients using it than any other program, but there are several other programs that I'm sure work equally as well.

Just a few short years ago, CRM was only for large companies because they were the only ones that could afford ERP systems – but that's all changed. Thanks to the needs of medium- to large-size CPA firms, software providers now have affordable CRM solutions designed to integrate with a suite of software to maximize productivity.

Sounds great, right? OK – but I've worked with CPAs for far too long to know one thing: this profession likes its solutions put in a box tied up with a pretty bow – ready to unwrap and begin using right away. Sounds great in concept – but sort of unrealistic when it comes to CRM programs. You have to put something in to get something out – and that takes hard work.

A colleague of mine, Lee Martinez of QVP Results, a CRM veteran who commandeered sales for such heavyweights as Ask Jeeves, Fusion Labs and Trillion, says organizations that want to succeed with CRM initiatives must work at the effort day-in and day-out in order to get results.

I agree with that. So, the question of the hour is: How can accountants do this in addition while keeping up with billable hours? In my head, CRM becomes a practice management function just like any other task associated with firm operations. Think of CRM as an extension of networking, for example. And, with the software programs in the marketplace, it's now easier than ever to keep up with CRM because the vendors offer assistance and training.

If you have a CRM program and aren’t using it, it’s time to step forward. Don’t let it