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I keep hearing that firms are beginning to warm up to CRM systems. What's all the fuss about? Why are accounting firms considering employing CRM systems? Why are they hiring marketing interns or directors and creating new client service policies?

After our economy experienced the recent downturn, firms are beginning to think about recovery, even building again. Firms who recently saw a loss of clients are now looking to shore up and consider building again, not only building bigger firms, but building more successful ones. Considering CRM is something I believe is necessary for growing and sustaining better firms.

There are two major characteristics to CRM software. While each characteristic is unique and provides completely different things, I believe they must be used in tandem to be completely successful. One component helps firms build and the other helps firms sustain. Both characteristics are useful alone, but inseparable in the most successful firms.

CRM, is most commonly known as Customer Relationship Management which I believe is far more important in sustaining firm success than growing a firm. The key word is "Customer." The most common use here is maintaining good relationships, even marketing those who are already our customers. Ultimately, this use is how we treat and interact with existing customers.

One of CRM's lesser known features, is the ability to market and manage marketing success. This is most commonly done with "prospects," those whom we want to begin doing business with. This is essential for the growth of any firm.

I never thought I would be writing about marketing to accounting firms. Over the

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become “old” and less relevant and simply fade. I see this in the area of technology, management methods as well as team dynamics. None of us can imagine our firms fading, so one potential option is to review CRM software. I think implementing CRM software is the foundation for finding, engaging and retaining new customers. Ultimately, growing and sustaining a firm.

When reviewing CRM software as a marketing tool, it must provide the following features:

1. Name & Addresses
2. Company Information
3. Unlimited Classifications
4. Multiple Sorts
5. Telephone Book
6. Built-in-Word Processor
7. Automated MailingEmail Campaigns
8. Tickler System
9. Track Notes
0. Personal Calendars
11. Scheduling
2. Hot list of To-do's

When reviewing CRM software as a sustaining tool for continued firm growth, in addition to those items listed above, they must include the following features:

1. Status System
2. Call History
3. Reminders

## 4. Portals

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