discovery meetings, referral clients and omni-channel marketing. Since many accounting professionals have not been trained in marketing, this leads to common errors and ...

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Providing the best client service possible is an important accounting professional mantra. Expanding your services within your client base is a common strategy. Adding new clients in your specialty or niche can be another. How do you manage your opportunities and pipeline? How do you apply product management principles to your services?

Sure, you can do this on a yellow tablet or in a spreadsheet, but these tools should only be used to start the process. They can work well for strategic thinking and prototyping, but if you intend to operationalize your offerings, you'll need to integrate the right practice management or customer relationship management (CRM) product into your everyday life. These tools may even be integrated with workflow and document management.

A few suppliers to the profession have created tools that they believe serve your needs. Among these are high end tools like Commercial Logic APS or PowerPM as well as products like OfficeTools Professional that is targeted at small firms. Using a system that has CRM, document management and workflow integrated, like APS, gives you one place to do your work. Consultants to the profession often encourage the use of CRM products such as SalesForce, Sage CRM or Results CRM, but don't always recommend that you integrate these systems into your mobile phones, practice management systems or web site, which is a strategic and tactical error.

There are other full featured social media marketing tools like InFusionSoft and Karbon Practice Management which tries to integrate all of your activities in a single place. Unfortunately, the major practice management products don't have enough

tools. You can apply the principles of these marketing methods to your technology tools.

What Should You Look For?

The key features of practice management that does CRM or a CRM that is integrated into practice management include the following:

1. **Integration to mobile devices** – This allows partners and staff alike to receive calls and send email from their mobile devices, enabled by having the right phone number, email and other critical contact information. I'm amazed how many professionals get outside of their office without this key information available.
2. **Accessibility from a browser** – These products should be simple to use and intuitive when run on both a mobile device and in a web browser. All of the common browsers (Chrome, FireFox, IE, Edge, Safari) should be supported. Licensing may be generous allowing casual use without additional fees or it may be fairly expensive for an occasional user. Watch your acquisition costs here.
3. **Two-way synchronization from opportunities into clients** – This facilitates maintenance of contact lists, addresses, phone numbers, email and other important information for things as simple as invitations or holiday cards to coordination of events or major service announcements into your Practice Management system. If the CRM is not built into your practice management, you'll want to understand how synchronization works from mobile to CRM to Practice Management and back. Having more moving parts can easily cause greater issues.
4. **Integration with mass email products such as Constant Contact, SwiftPage, MailChimp or similar tools** – Even though there has long been a culture of minimal intrusion or no spam in the accounting profession, you need a way to stay in touch with clients communicating about your services. Expect not only email support, but text message (SMS) support as well.

5. **Relationships are important** – Part of the reason that many Practice Management

same system.

7. **Integrations to other platforms** – Not all practice management or CRM systems can provide all of the functionality needed. For example, do you have literature describing services in PDF format that you'd like to deliver? How about a video explanation that you recorded in Camtasia? If you need document management, portal and other functionality, look for the additional integrations offered OR that everything you need is inside the system being considered.

There may be more features and capabilities that you want in your ideal system. There are not an abundance of choices for the profession, but all of the systems offered are better than Excel spreadsheets and most Access databases. You should strategically strive to minimize the number of systems involved to work your business development model.

And What's The Benefit?

No technology should be deployed just for technologies' sake. Do you have any dropped balls, missed due dates, projects out of control or too many places to look for client information? Is the only master contact information inside your tax or billing system? How are you communicating your firm's growth goals to team members? Are you reviewing your strategies on a regular basis with your team members? Do you have a tool that lets you have this discussion? Most firms don't have enough control over the information they have on product services, niches or business development to be able to adjust their strategy. Are you flying blind with old or no tools? The right culture and the right practice management or CRM system can help achieve your business goals.

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