

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

basic tools as a CRM system, this is far from accurate.

John Higgins • Mar. 14, 2016

Although CRM usually stands for “Customer Relationship Management,” in the accounting profession, we prefer the term “client” over “customer.” When focused on the needs of an accounting firm, these systems can offer a centralized location for tracking all communications with all clients, as well as with prospects and other new client generating activities.

While some may think that their Outlook or other email system offers the same basic tools as a CRM system, this is far from accurate. While Outlook and the others do offer varying degrees of additional management functions, dedicated CRM systems track much more than just email, offering tools for managing and tracking phone calls, voice messages, text messages and notes, as well as client documents that have been digitized. Additional tools found in some systems include advanced practice management and workflow optimization controls.

The primary goal, however, is to centralize and streamline the management of client outreach and contacts, replacing antiquated or separate systems, such as phone call notes, note pads and spreadsheets.

Although I don't consider Outlook to be a full CRM system, it does offer benefits above a basic client roster, and since it is used by a vast majority of professionals, we've included it in this article. At the least, it will allow users to benchmark their current system and see if they are utilizing Outlook fully.

So let's take a look at what the market has to offer. These are the CRM systems included in this review:

- [CCH iFirm](#)

- [Microsoft Office 365 Outlook](#)

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

John Higgins, CPA, CFP® is the president of CPA Crossings LLC. He is a strategic technology advisor to accountants and tax preparers on workflow automation, cloud accounting and other applications of technology to increase productivity and profitability. John has recently launched his firm's new Cloud Accounting Learning Center. Visit his web site at www.cpacrossings.com for more information.

Firm Management • Technology

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved