



Committed to the growth and success of our clients.



## A CRM Success Story

### ABOUT ORBA

Ostrow Reisin Berk & Abrams, Ltd. (ORBA) is a full-service accounting, tax and consulting firm dedicated to helping clients reach their goals and achieve success. Based in Chicago, ORBA was founded in 1977 and has grown to more than 135 employees over the past 40 years.

ORBA serves clients in a variety of industries, providing audit, consulting and tax services to privately held companies, not-for-profit organizations and high net worth individuals.

ORBA delivers their services with a holistic understanding of accounting, tax, financial and broader challenges, along with a passionate, personal, always-on approach to client care.

### BACKGROUND

CLIENTSFirst was retained by ORBA when the firm's CRM manager departed, leaving the firm with a need to continue to create and implement a set of manageable best practices for CRM maintenance and data integrity.

Initially, CLIENTSFirst CRM Success Consultants worked with ORBA's marketing department to gain an understanding of the firm's needs and requirements in order to establish and enhance processes and provide solutions for consistent data maintenance.

To build on initial success, a CLIENTSFirst outsourced CRM Administrator then stepped in to serve as interim CRM manager. The CLIENTSFirst and ORBA teams worked together on several beneficial CRM and data quality projects, including:

- Training Marketing team members on CRM features and best practices
- Creation of an on-site "Train the Trainer" course to facilitate ongoing instruction for new members who join the firm
- Review of the firm's CRM data quality and assessment of data issues
- Comprehensive cleansing and enhancement of the firm's CRM data
- Assisting Marketing and IT teams with a firm-wide system upgrade
- Ongoing maintenance, research and updates for email unsubscribes and bounces
- Importing contacts from ORBA's email marketing platform into the CRM system to keep email list information current
- Upgrading the CRM mailing list management tool to allow directors and staff to more efficiently build, edit and manage lists

### **Describe the importance of CRM to achieving the firm's marketing and business development objectives.**

Our CRM supports and helps drive many of our marketing, communications and business development initiatives. From understanding who our clients are and how they are connected to us, to knowing our prospective clients and other contacts and delivering marketing content in a seamless way, our CRM is at the core of making all of this happen. We've found that being able to use the data in a variety of ways helps us be more successful in creating effective marketing programs to reach our clients as well as prospective audiences who would benefit from using our services.

### **What were some of the firm's CRM or data quality challenges?**

Our issues are like those of any other professional services firm. We need to deal with duplicate contacts, outdated and incomplete information and bounced and returned emails. We need to create and implement processes to ensure that the data remains up-to-date. Often, that maintenance is placed on the back-burner due to other more pressing projects. We also need to find ways to engage our employees to get them to maintain their own contacts.

### **What drove the decision to use CLIENTSFirst CRM / Data Quality services?**

Using CLIENTSFirst's data quality services enabled us to focus on the key maintenance processes that needed to be reviewed and improved upon in order to maintain our data integrity. Now that we have many of our key processes in place, we have found a good balance between knowing which projects are most cost-effective to outsource and which can be handled by our marketing team.

### **How have CLIENTSFirst's services contributed to ORBA's success?**

While data is never perfect, we believe we are achieving success in implementing monthly processes and cleanup tools that address our issues, along with user training and education.

### **What CLIENTSFirst services or support has ORBA found particularly valuable and why?**

Making the decision to outsource some of our initial and ongoing data maintenance functions has provided ORBA with a cost-effective solution for maintaining data integrity, and it has enabled us to recoup staff hours so we can focus on key business development projects.

### **How has the CLIENTSFirst team supported you and helped improve your data quality?**

We have worked with our CLIENTSFirst team to address a variety of ways to not only clean our data, but also to run and review routine reports that identify issues as they arise. When things come up, they have acted as a sounding board, applying their collective experience and expertise to help find the best solution.

*"Partnering with CLIENTSFirst allows us to focus on other key initiatives while being able to maintain a high level of data integrity in our system. They are always there to provide counsel and collaboration on issues when we need them. The knowledge, expertise and best practices that the CLIENTSFirst team provides us is an invaluable resource."*

- Joy Long, ORBA Director of Marketing



For more than a decade, CLIENTSFirst Consulting has been providing technology, consulting and intelligence solutions to help professional services firms enhance their marketing and business development efforts. We offer a complete portfolio of services including CRM and eMarketing Consulting, Data Quality Solutions and Client Intelligence to help our Clients grow and succeed.

Our team of almost 100 consultants and professionals share one common goal: to provide our Clients with unparalleled services and service.

For us, putting Clients first is not a philosophy...

*It's who we are!*