



Navigating James Moore & Co. Down the Path to a Successful CRM


BACKGROUND

James Moore & Co is a CPA and accounting firm composed of 280+ professionals who work from 5 offices across Florida serving multiple verticals. Stacy Dreher has been with the firm for over a decade and is the Director of Practice Growth, overseeing the marketing and sales strategy across all channels.

Foundational to the revenue-generating activities of sales and marketing is quality contact data that professionals can access with efficiency. Prior to 2023, the professionals at James Moore were challenged to efficiently leverage the strength of their own contacts and relationships.

Contacts lived in multiple platforms, including the firm's CRM tool, the practice management system, a variety of work production tools as well as individual Outlook address books, and this meant data sources were often conflicted and out of date, and relationship strength was not easily measured.



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Stacy commented: “We really wanted one place to be that single source of truth where our professionals would have the confidence to go and to know they were accessing the best contact information for a particular contact as well as to be able to quickly assess the strength of that relationship including who else within the firm is connected with the contact. It made sense for that single source of truth to be a CRM.”

The firm's current CRM, unfortunately, was not robust enough to manage the marketing campaigns that Stacy wanted to run.

“We needed an upgrade,” Stacy said.

CRM SELECTION + PROCESS

A new CRM project was approved by late 2022, but, as Stacy was concerned about engaging in multiple sales cycles of various competing products without expert guidance, she endeavored to bring on an unbiased consultant to help ensure project success.

She commented: “In the CRM world, you don't know what you don't know. There are so many tools out there and product demos are biased, sales-driven views of products not tailored to understanding the product's full capabilities for my organization. We were keen to partner with a platform-agnostic expert who could stand on our side and help us understand the benefits of each platform for our unique instance.”

Through recommendations in her peer network, Stacy was referred to CLIENTSFirst Consulting and felt the CLIENTSFirst team had the requisite expertise and unbiased approach to fuel a successful project. James Moore, to that end, engaged CLIENTSFirst in early

2023 to help the firm with the CRM selection process, to bring to bear their expertise in a broad range of platforms that would help James Moore find the right CRM fit, as well as to provide expert insights into CRM best practices, and level set goals and adoption expectations of CRM within the firm.



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During a CRM Success Assessment, CLIENTSFirst interviewed key groups of stakeholders to gather the firm’s needs, requirements and success criteria. That information was then used to create a demonstration roadmap to help guide the vendors to focus on only the core requirements and goals, rather than system “bells and whistles.” A related demo scorecard was used to support the process, ensuring an objective assessment of software options.

Stacy comments: “The CLIENTSFirst team was quite simply my go-to throughout the process.”

RESULTS + TAKEAWAYS

The firm’s new CRM is now in progress to be the single source of truth for the full lifecycle of contact data for James Moore, from sales and marketing, to onboarding, through relationship management, marketing campaigns and pipeline management. The full implementation is scheduled for completion on November 1st 2024.

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The CLIENTSFirst team also cleaned and enhanced their prospect contact records so that they could be migrated to the new system.

James Moore’s professionals are already synchronizing their Outlook with the CRM, seamlessly integrating activities like meetings, phone calls and

follow ups. User behavior has also changed as professionals now know the firm’s data lives in the CRM and that the data that lives there is accurate, creating firm wide efficiencies that accelerate sales.

Stacy concluded: “I highly recommend CLIENTSFirst Consulting; their expertise in the CRM selection process, through guidance, best practices and platform adoption provided a significant value. They helped our firm navigate the technologies and how our firm would use CRM, achieve adoption, and they truly shaped our mindset of CRM success.”



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For almost 20 years, CLIENTSFirst Consulting has been providing marketing technology consulting, data quality services, and outsourced marketing staff services to help firms enhance their marketing and business development efforts. We offer a complete portfolio of services including CRM and eMarketing Consulting, data quality improvement solutions to help our clients grow and succeed. Our team of over 100 consultants and data quality 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!