

A hand-drawn whiteboard with the word 'PROFESSIONAL SERVICES' in large red letters. Surrounding it are various service categories: Investment management, Accounting, IT Consulting, Management Consulting, Monitoring and Evaluation, Staffing, Financial Planning, and Actuarial. A hand is shown writing on the board with an orange marker.

Consulting and Professional Services Firms

As a professional services provider, you understand the importance of maintaining strong relationships with your clients. Several departments and individuals throughout the firm work to maintain and grow these relationships; however, defining and implementing a firmwide client relationship strategy that grows opportunities within your client base as well as externally is a challenge. Siloed tracking methods and interactions with current and potential clients can lead to missed opportunities, hinder client relationships, and ensure misallocated resources take time away from billable hours. If you can't trust your data then you are losing valuable insights to craft, execute, and monitor a holistic relationship management and growth-driven strategy.

Professional services firms take a nuanced approach to business and revenue models that creates a unique set of relationship management challenges. You are selling your skills, competence, and proficiency to clients, and that requires building a level of trust before you may even be considered to provide services.

Your business and your relationships are different—and your tools should reflect this. InterAction is a CRM solution that works with practices specific to you and your industry to ensure you get the most out of your customer relationships.

**With InterAction,
you can:**

- ✓ **Improve utilization rates and staff productivity**
- ✓ **Capture insights to inform business development and marketing strategies**
- ✓ **Reduce duplicate data and resource overlap**
- ✓ **Target new business opportunities**

Increase Client Retention

Developing long-term clients requires consistent communication and management. Keeping client data accurate and current is an important piece of this effort so you know when and where to send valuable information. InterAction provides a holistic view of a customer's interactions across the firm and even identifies potential gaps in relationships.

Manually checking and updating contact information is time-consuming and takes valuable time that could be used for growing the business.

Measure the profitability potential of clients and opportunities

Gain relationship intelligence and save time and money by targeting your business development efforts. InterAction IQ scores each client as part of his or her data profile based on the strength of specific engagements. This scoring model, along with maintaining accurate and insightful data, ensures your team is focused on nurturing clients that have the greatest chance of delivering new business.

When you identify targets and develop a strategy for approaching them, you can take full advantage of your team's resources and skills and apply them where they will be most effective.

Focus on Growth

InterAction is tailored for the professional services space because it is based on a common-sense belief: the more you know about your clients and customers, the better you can tailor your responses and services to them, resulting in more business.

And with the InterAction IQ, you are given a 360-degree view of all your relationships. Protect your relationships by understanding which key staff members are connected to each client, and be prepared once those people are no longer with your organization. Ensure that you are maintaining consistent client touches by tracking your activities and preventing overlap.

Move away from spreadsheets and stop losing billable hours to inefficiencies and leaving opportunities for growth on the table. Uncover actionable market, industry, and practice area information and get it to the right people. With InterAction, you can do all of this and more.

Access, Analyze, and Grow Your Client Database.

- Instant access to client information and holistic relationship data
- Pull reports and derive insights that help company leadership make strategic decisions
- The IQ feature automatically analyzes e-mail correspondence of associates and partners to uncover the existence and strength of previously unknown contacts and relationships

Grow your bottom line by taking advantage of:

- Targeted marketing
- Increased customer retention
- Cross-sell/upsell opportunities
- Leveraging current relationships

Contact our representatives for more information or to schedule a demo.

LEARN MORE

 [INTERACTION.COM](https://www.interaction.com)

 877-308-8557

