



## CRM Serves as Platform to Manage Firm's Growth

*For nearly 50 years, Dixon Hughes has provided accounting, auditing, tax and consulting services to businesses in a variety of industries. Dixon Hughes ranks among the nation's top 20 CPA firms, and is the largest CPA and advising firm headquartered in the Southeast. A staff of more than 1,100 employees delivers solutions to meet business challenges for clients throughout the United States.*

### Growth Sparks Need for Improved Relationship Management

Dixon Hughes serves specific practice area clients through strategically placed regional offices. Key markets include automotive dealerships, construction, financial institutions, healthcare, insurance and real estate. Recent mergers have fueled an aggressive growth opportunity for Dixon Hughes to become a 'super regional' firm. With this positive momentum, the firm knew it needed a better way to manage relationships with their clients and prospects.

Client information existed everywhere – on paper, in spreadsheets and in people's heads. They didn't have a good system or process in place to track or measure client and prospect activity. Something had to change, so the firm began seeking a solution.

### Pulling the Pieces Together for a Strategic Solution

With a philosophy geared toward embracing new technologies, Dixon Hughes reviewed Microsoft Dynamics CRM as a potential solution to their relationship management challenges and they liked what they saw. But they knew that software alone wouldn't solve their issues. Instead, Dixon Hughes viewed CRM as a process change tool within the firm's culture. Equally important was the firm's realization that success meant getting help to implement the system and make it work properly in their environment.

About that same time, representatives from Dixon Hughes attended a Microsoft event where they were introduced to Customer Effective – a Microsoft Gold Certified Partner. Customer Effective quickly demonstrated expertise for CRM technical deployment, training and implementation planning – thanks to their experience with hundreds of CRM projects. Customer Effective's focus on Microsoft Dynamics CRM gave Dixon Hughes confidence in choosing them to lead the CRM rollout.

Instead of tackling a mass CRM deployment, Customer Effective recommended a strategic approach custom developed for Dixon Hughes. The process began with developing a blueprint that specified how CRM should be implemented. Customer Effective interviewed leadership team members to document relationship management issues, understand specific challenges the firm faced and opportunity pipeline management. Customer Effective also included a plan for integrating CRM to CPA/MIS® - Dixon Hughes' time tracking and billing system.

*"The blueprint served as our CRM implementation guide," says Scott Moore, director of marketing and business development for Dixon Hughes, and CRM project manager. "By assessing our business needs first, Customer Effective designed the right process and approach for our firm. The entire blueprint was custom-developed to our needs and provided a tailored approach for a successful implementation."*

By following the blueprint, Customer Effective broke the project into logical launch phases including system design, development, configuration and testing. The plan clearly addressed issues specific to sales, marketing, technology and administration as key areas for system deployment.

### Implementing the Plan

Dixon Hughes prepared for the CRM rollout by creating a core group of 25 users from key practice areas to train on CRM. As training and implementation progressed, each team member became more self-sufficient. When they could train others in their particular practice areas, the use of CRM extended from group to group.

One of Dixon Hughes' biggest issues was integrating CRM with client data. Customer Effective met the challenge by developing an interface plan between CRM and CPA/MIS® and working with technology resources from Dixon Hughes to create a seamless integration. By synchronizing CRM to CPA/MIS®, Dixon Hughes now has their key systems fully tied together.

*"Customer Effective looked at our needs strategically to determine how we should use CRM in our business environment," says Moore. "They have clearly demonstrated technical expertise which has turned strategy into execution."*



Using CRM has improved practice area collaboration within Dixon Hughes and is key to driving business development activity. These advances in collaboration are important because they represent a critical component in the firm's matrix strategy of having a multi-office, geographic and practice area market reach. Dixon Hughes relies on CRM as an integral part of how they approach sales, marketing, prospecting, business development and relationship management.

### Building Results in the Construction Market

Mike Trammell, member in charge of the construction services group for the western Carolinas region, affirms that CRM has positively impacted their prospecting and business development activities. His team has experienced greater efficiency in these areas because CRM enables them to know who has contacted whom, and when the last contact occurred.

The result? Duplicate business development efforts are a thing of the past. Through disciplined scheduling and planning, Trammell's team is more consistent with customer contacts and now has reliable pipeline reporting and activity tracking. System reminders make routine calls and follow-up activity for relationship nurturing more efficient.

Trammell credits Customer Effective for being well prepared and taking a professional approach to the CRM implementation.

"Customer Effective understood that users would have varying degrees of needs and experience levels," Trammell says. "Through the entire deployment, Customer Effective kept us informed of total project progress and quickly addressed any issues that arose."

### Breathing New Life into Healthcare Leads

Dixon Hughes' healthcare consulting group has seen numerous benefits with CRM. The senior living practice has embraced CRM for lead tracking, lead management and reporting. Because sales cycles can run 12 months, CRM provides a tool that identifies new opportunities and tracks all lead activity through closing. Geographic sorts and lead type classifications have helped the practice become more effective with business development activities. For example, if someone has a trip scheduled to Boston, a quick sort within CRM shows where the group is cultivating other opportunities -- geographically and by practice area.

This enables Dixon Hughes to determine if additional meetings should be scheduled for the same Boston trip or if another practice area has activity nearby. The senior living practice also leverages the CRM for email blasts, direct mail execution and newsletter distribution. Customer contact touch points have increased as the entire practice relies on the system daily for business development purposes.

Senior living practice manager Keith Seeloff depends on CRM to keep him updated on all sales activities. Weekly and monthly reports provide convenient snapshots of opportunities no matter where they reside within the sales cycle.

"Our CRM system does all kinds of things," says Seeloff. "It's a tool for the entire team – the whole practice – which means we all know exactly what is going on at all times."

### Marketing Measurement and Fuel for Growth

Dixon Hughes uses CRM to track all marketing activity and connect campaign results for accountability. Any campaign initiative for lead generation is tracked and within CRM. The system captures results and measures rates of return based on new accounts and revenue potential for the firm. Customized reports provide data related to wins, losses, delays and existing opportunity status. This enables Dixon Hughes to better plan campaign budgets and tactical marketing activity.

"CRM is the common platform to collaborate and manage all activity for our firm's growth strategy," says Moore. "CRM data is the fuel for what the firm's groups are doing for practice development. Our decision to partner with Customer Effective to help put us on this path has proven to be the right move. We're extremely pleased and are now well-positioned to accommodate and manage future growth."

The number of users continues to climb as the practice areas embrace the power of CRM. As Dixon Hughes experiences additional growth, their dependency on CRM will expand and play a key role in relationship management. Without question, Dixon Hughes will continue to serve their clients professionally with local responsiveness and personal attention.

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