

## How CLA Achieved Digital and Business Transformation with Introhive

ClifftonLarsonAllen LLP (CLA) is a professional services firm and the eight-largest accountancy firm in the United States, built to create opportunities for private businesses, public companies, governments, nonprofits, and the people who own and lead them.

To support their organization-wide digital and business transformation journey, CLA integrated Introhive into their daily business development and sales processes. Deploying Introhive allowed CLA to capitalize on greater visibility into existing client connections to improve collaboration in relationship management and develop mature sales processes to increase productivity, performance, and sales training.

### Challenge

CLA identified a need for improved data automation in their sales and marketing operations and sought detailed client contact information. They also faced low CRM adoption and were in the early stages of establishing a strong sales function and processes. Their continued headcount growth made it difficult to understand connections across the organization to coordinate relationships effectively.



"It's really important for us to be able to surface new and seamless revenue opportunities, especially as we expand our teams and grow the organization.

**LANI WARSAW** | Manager, Marketing Technology, CLA



## Solution

With Introhive, CLA has automated contact syncing and enrichment, client briefs and pre-meeting preparation, and relationship mapping across their organization – introducing efficiencies to their business development and sales processes.



### Automated CRM Sync

Contacts are updated and synced automatically so that CLA professionals have a comprehensive list of prospects and clients to begin their outreach and build targeted marketing campaigns.



### Quick Meeting Prep

CLA professionals receive comprehensive client briefs packed with insights on client news, social media feeds, relationship insights and connections, and meeting attendee profiles to better prepare ahead of time.



### In-workflow Insights

Introhive's insights are integrated into CLA's daily workflows, giving their professionals access to all prospect and referral intelligence and interactions within a single, centralized location.



"As part of my normal weekly cadence, I can see my top clients, prospects, and referral sources all in one place. I can also see the last time other members of the team and I contacted them, making it a powerful tool in developing seamless relationships across clients."

**BRENDAN KURVERS** | Principal, CLA



## Results

CLA has already seen efficiencies in the daily workflows of their business development and sales professionals by leveraging Introhive's business intelligence dashboards and contact syncing. Across their client-facing teams, they've achieved greater CRM adoption and technology enablement with higher employee engagement, productivity, and performance.



An organization-wide view of client data for coordinated relationship management.



Effortless meeting prep. and automated contact syncing to streamline outreach.



Clean, targeted contact data for better prospecting and marketing campaign results.