

Kaufman Rossin automates revenue-driving activities, increases CRM value with Introhive

A long-time proponent of innovation, Kaufman Rossin initially turned to Introhive for help boosting their lagging CRM adoption. Then they discovered the raw power of easy access to their own, high-quality relationship data to drive revenue. Among other wins, with Introhive, Kaufman Rossin was able to:



Increase CRM adoption



Visualize client engagement



Automate intelligent lead generation



Uncover valuable connections to targets

About Kaufman Rossin

One of the United States' largest CPA and advisory firms, Kaufman Rossin is headquartered in Miami and provides professional services, including accounting and tax and consulting, to businesses, attorneys, bankers and individuals in dozens of countries.

Opportunity

LOOKING TO BOOST CRM ADOPTION

Kaufman Rossin's business development and marketing teams knew their efforts were hampered by a lack of quality contact data in the firm's customer relationship management tool (CRM). Some users hadn't logged any data in months. As the firm grew, it had also become harder to keep tabs on their network of relationships.



"The sales process for professional services relies on relationships. Marketing can build awareness, educate prospects, and nurture leads. But knowing who knows who through an easy, automated tool like Introhive can take us to the finish line faster and more effectively."

JANET KYLE ALTMAN | Marketing Principal, Kaufman Rossin





"You can do it the Introhive way—where data capture is automated and users can easily sync contact information and activity—or you can hire assistants to enter that data manually. We chose the automated way. We didn't see the value in hiring a million people to simply do data entry."

MAXIE MATT | Marketing Automation Manager, Kaufman Rossin



Solution

INTROHIVE FILLS CRM WITH SALES ACCELERATING DATA

In less than two months, the Introhive team collaborated with Kaufman Rossin to implement and train all the firm's 165 users on their Introhive solution, which included:



Automated CRM Sync

Kaufman Rossin users easily create new contacts and update existing contact information in their CRM tool with one click.



Quick Meeting Prep

Before each client or prospect meeting, partners are now equipped with Pre-Meeting Digest, a custom email report packed with intelligent information—like company news, social media feeds, stock quotes, who-knows-who intelligence, and more—so they're prepared and successful.



In-workflow Relationship Info

Without leaving their email, the firm's users can visualize who knows who—and how well—across the firm's entire network, including recent account activities, relationship strength trends and more.

Results

BETTER DATA HELPS FIRM CREATE PROCESSES THAT DRIVES REVENUE

With Introhive, Kaufman Rossin went far beyond checking off their original goal of increasing CRM adoption. The platform empowered them to eliminate time-consuming data entry and help their business development and marketing teams drive revenue by visualizing and acting on connections.



Actionable, in-workflow relationship insights.



Effortless meeting prep.



Clean, targeted marketing data.

"Introhive made my life easier," says Maxie Matt, Marketing Automation Manager at Kaufman Rossin. "We see warmer leads instantly, without having to ask, 'does anyone know this person?' And I don't have to convince people to log in and enter data into the CRM. Our salespeople can focus on the purpose: to get leads. All the activity—meetings, emails—it's all in there automatically. At the end of the day, that data helps us thrive."



See how Introhive can help you by visiting www.introhive.com/demo

www.introhive.com | info@introhive.com | US & Canada: (866) 824-5452 | UK: +44 (0) 20 7305 7350