

Frazier & Deeter, Introhive automates growth operations, eliminates painful manual work

A multiple award winner for their commitment to innovation, accounting firm Frazier & Deeter came to Introhive for help easing their manual marketing processes. But beyond time-saving automation, they also revealed growth-driving relationship insights. Among other wins, with the Introhive platform, Frazier & Deeter was able to:

- ✓ Grow a marketable database
- ✓ Accelerate business development
- ✓ Visualize client engagement, traction
- ✓ Enhance cross-practice selling strategies

About Frazier & Deeter

Founded in Atlanta in 1981, Frazier & Deeter is a nationally recognized CPA and advisory firm and one of the largest and fastest-growing accounting firms in the United States. Its offices across the country provide a wide range of tax, audit, accounting, fund administration and advisory services.

Opportunity

MORE EFFICIENT LIST BUILDING FOR MARKETING CAMPAIGNS

With a global pandemic and changing business landscape, Marsh not only needed to come up with a digital strategy to stay in front of their clients – but also shift their focus to relationship selling in order to drive new business and find cross-practice opportunities. Solving this problem was not an easy task. An output from the exercise was for the team at Marsh to evaluate a global CRM transformation.

Solution

INTROHIVE AUTOMATES CRM MANAGEMENT

The Introhive team collaborated with Frazier & Deeter to implement and train all the firm's users on their Introhive solution, which included:



Automated Salesforce Sync

Frazier & Deeter users, including those without a CRM license, can easily create new contacts and update existing contact information in Salesforce with one click—right from their inbox.



Better, Faster Meeting Prep

Before each client or prospect meeting, partners and practitioners 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 for every client interaction.



In-workflow Relationship Insights

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, connected colleagues and more.

Results

BETTER DATA ENABLES FIRM-BUILDING CONNECTIONS

After just three months with Introhive, Frazier & Deeter went well beyond their original goal to ease list management pain. Predictive intelligence and data entry automation alone delivered a six-figure return on investment. And the firm discovered thousands of relationships (including business development opportunities) and practical relationship insights. Benefits included:



\$200,000⁺
return on investment.



7,900
new contacts identified,
enriched and synced to CRM.



31,000⁺
relationships discovered
across key accounts.



Effortless
meeting prep for every client-
facing partner, practitioner.