Connect Client Data to Drive Growth

Tools, reports, and services to maximize the return on your CRM investments

WILSON ALLEN

Automate data segmentation and data quality and free marketing to focus on more strategic tasks

Like many businesses, professional services firms are redefining how to go to market to face increased competition, meet client expectations, and drive growth. You're reconsidering how customer relationship management (CRM) technology can help you connect with clients to better support your strategic objectives.

To succeed, your firm must prioritize how to fully leverage its people, knowledge, and experience. But often there's a disconnect between the firm's software systems, which prevents you from fully mining the rich relationship data you've collected throughout your intake, conflicts, customer feedback, and time and billing processes.

By aligning software and drawing data from a wide array of systems, your firm can use its data more strategically to identify, win, and keep high-value work. Wilson Allen has made this task easier with the CRM Toolkit. Designed for professional service firms, the toolkit allows firms to manage data more effectively without adding additional burden to existing data management resources.

The CRM Toolkit is ready to deploy for InterAction software but can be configured to help streamline data management processes for other CRM systems.

The CRM Toolkit provides firms with the ability to:

- Automate data segmentation and data quality functions
- Reduce data stewarding costs
- Free marketing and business development professionals to focus more value-added tasks
- Deploy more effective sales and marketing activities by being able to target contacts more accurately
- Ensure marketing lists comply with email marketing whitelist rules and various data privacy obligations like CCPA, CASL, and GDPR

Bring together data from across the end-to-end client life cycle for better business performance

Simplify data management with the CRM Toolkit

Data Segmentation Applications

Contact Scoring

The Contact Scoring module enables CRM teams to automatically rank companies and contacts based on a range of different criteria and visualize the results in dashboards. For example, firms can rank contacts based on their importance to the firm, level of engagement, and decision-making role and then develop data management and business development strategies around those rankings.

Contact Segmentation

The Contact Segmentation module assists firms with the often-difficult task of classifying contacts based on their role, specialization, and seniority. The module searches for keywords contained in the contact's job title and department and then assigns a set of additional fields to classify this data. The tool is pre-populated with thousands of pre-defined mappings; however, firms can tailor the keywords and the additional field values.

Relationship Manager

Firms often struggle to keep relationships and "My Contacts" in line for users. The Relationship Manager module changes relationships automatically in certain circumstances, such as when someone leaves the firm, or when a user deletes a contact from their "My Contacts." The application can also create relationships when one doesn't exist – for example, if a user has sponsored a contact on a marketing list but not created a "knows" relationship.

Data Quality Applications

Data Confidence

The Data Confidence module uses an automated process to analyze data and then rank it according to the method and recency of any data validation activities, the user that made the update, what was updated, and when. For example, if a trusted data steward made the update recently, then that data would receive a high confidence score.

Domain Email Validator

The Domain Email Validator module identifies where a contact has personal email addresses (e.g., Yahoo) and links these automatically into a folder. A data management user can then validate if the correct permissions exist to use the personal email address and that the address is classified correctly (e.g., sometimes they are flagged as a business address).

Archive

Archiving contacts manually in InterAction is a time-consuming process, and if contacts remain associated with publicly visible entities, they can still be found. The Auto Archive module enables an administrator to archive contacts from the system with a restore option if needed on a case-by-case basis.

Strengthen data governance

Wilson Allen helps firms maintain the quality of important data through the development of a data governance framework that includes:

Segmenting data and create an "ideal record" definition:

- What fields the firm wants to track
- How data will be gathered (e.g. through automation, integration, or manually)
- Who has responsibility for that data

This effort then results in:

- The creation of a KPI framework including the metrics that will be used to demonstrate progress and how will that be reported to the business
- What training needs to be in place to ensure that users understand their obligations
- How does the data governance framework connect to other workstreams and systems across the firm

Rely on trusted expertise

Wilson Allen has combined the collective expertise of our data and practice management system specialists with a focused CRM practice. We've completed more than 200 CRM projects for firms worldwide and have created a portfolio of best-in-class services and solutions that empower business leaders to manage the client life cycle more effectively. Whether you're in the early stages of a CRM implementation or have a system in place, call on our team in any capacity to help your firm realize the full return on its CRM investment.

- **CRM Strategy:** Implement or relaunch a CRM platform to support your strategic goals.
- **Data Audit:** Analyze your existing CRM data and implement practical strategies for addressing issues and concerns.
- **Data Management:** Access a huge library of tips, tricks, and tools for cleaning up data or make use of our highly experienced data management resources.
- **Marketing Automation:** Identify and implement the best system to automate marketing processes.
- **Reporting:** Get to your firm's underlying data and optimize how users engage with it.
- **System Integration:** Bring together intake, finance, HR, marketing, and CRM data and support master data management and report creation.
- **Training:** Become in-house experts on a range of CRM systems and in data management and cleaning techniques.

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