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including a more prominent social media presence, more aggressive direct mail advertising, and increased email marketing campaigns hoping to drive new business to their firm.

**Mary Girsch-Bock • Feb. 19, 2020**

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\* = ON-PREMISE OR HOSTED

## Relationships.

Whether you sell a product, or as a CPA, your services and expertise, you need a way to develop and nurture relationships. Potential leads, like relationships, have a way of fading away if they're not given the attention they deserve.

Today, many accounting firms have ramped up marketing programs for their firm,

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Maybe your firm is at its max, and you're not taking new clients. What are you doing to ensure that your current clients are happy, and remain so? Anything? Do you engage them throughout the year, or only during tax season?

That's why CRM (customer relationship management) software can be particularly useful for your firm.

Traditionally used by businesses selling products, CRMs are now becoming a staple in service businesses as well, allowing you to keep track of potential clients, while also helping to ensure that your current client base is kept happy.

If you're interested in a CRM for your firm, be sure to check out our reviews in this issue. We took a look at four CRM applications that may be a good fit for your firm. Those applications include:

- [Accelo](#)
- [Insightly](#)
- [Results CRM](#)
- [Zoho CRM](#)

Additional CRM Add-On Tools:

- [Office Tools Workspace](#)
- [Microsoft 365 – People](#)

While each application is different, they all provide you with the ability to manage both potential and current clients easily. It's up to you to decide what specific features your new CRM application needs. Here are a few other features to consider:

- **Online accessibility** – This should be a must, since it's likely you or other firm

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your firm about:

- **Reporting** – What kind of reports do you want to create? Does the application you're interested in create those reports?
- **Import/export options** – Can you easily import or export client lists?
- **Help/support** – Help and support are important for new CRM users. Does the product you're looking at offer support options that work for you?

That's all a lot to think about, but knowing what your firm needs up front will make it much easier to find and implement a CRM application that is well-suited to your firm.

Firm Management

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