



IRIS CRM powered by FibreCRM

A cloud-based sales and marketing system to help grow your accountancy practice

KEY BENEFITS

- ▶ Identify upsell/cross-sell opportunities and find more profitable customers
- ▶ Automate digital communication (email and SMS) with powerful workflows based on the data from IRIS Accountancy Suite
- ▶ Partners can easily see which clients were last contacted, when they are next to be contacted and what services should be discussed
- ▶ Your network of referrers are nurtured so that more referrals come your way
- ▶ Links dynamically with many leading solutions such as Microsoft Office Outlook and Mailchimp
- ▶ Marketing lists are never out of date, duplication is eliminated and data is clean
- ▶ Dynamic reports transform into actionable opportunities - discover your customers' habits and needs
- ▶ Access from any web-enabled device: in the office, while travelling, on clients' premises...

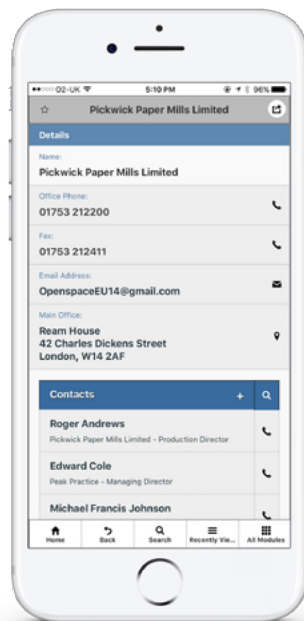
"Amazing! Being able to use my iPhone to look up client information during a visit clearly impressed my client."

Most firms recognise that relationship management is the cornerstone of a successful practice. Relationships secure fees and profits and help to build the firm's reputation. But when it comes to marketing and cross-selling services, our experience tells us that most accountants use a mix of email marketing, Excel spreadsheets and Outlook to build their communications plan.

Valuable data in IRIS is extracted as lists periodically, and we know issues such as multiple lists, duplicate data and missing data can arise. Often this information needs to be combined with other data sources such as a list of prospective clients that don't exist in IRIS Practice Management.

IRIS CRM is a complete, 360 degree sales and marketing solution that drives practice growth, supports marketing activities and streamlines client care processes.

IRIS CRM shares data from IRIS Practice Management so all client, prospect and referrer information is kept together in one place for all partners and staff to keep track of relationships, marketing activity and prospective business.



One combined view

All IRIS Practice Management clients, attributes, services, jobs and tasks synchronise with IRIS CRM. This helps realise the full potential of the existing data in IRIS Accountancy Suite to increase practice revenue, identifying up selling/ cross selling opportunities and executing targeted marketing activities.

Having all your information in one place not only provides the visibility needed to manage relationships, it also has a big impact on staff productivity. Marketing activities become much less laborious to complete. Partners can focus on those clients that need attention far more easily.

"Our 'services by sector' pie chart highlighted we were under selling our Corporation Tax service. IRIS CRM built and maintained a marketing list of all clients we wished to target for this service. Job done."

Create a more efficient and profitable practice - retain clients and build a loyal following all with IRIS CRM software.

IRIS CRM connects to your existing systems, such as:

- IRIS Practice Management
- Microsoft Office Outlook
- Website Forms
- Mailchimp

IRIS CRM works out of the box

The investment cost and time to be up and running is significantly reduced compared to a custom development or ongoing labour-intensive manual extraction of data.

Dynamic reporting

IRIS CRM delivers transparent reporting and then takes it a step further - transforming reports into actionable opportunities helping to drive decisions and actions.

Information on the move

To access IRIS CRM all you need is either an internet connection or Smart phone. You can easily see all recent interactions that have taken place with the client before your visit, find a phone number or see directions to their office.

Data security

All data centres operate within UK borders with extremely robust and hardened security certified to ISO27001, ISO9001 and ISO14001.

