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Client Relationship Management Software
for Progressive Accountants in Practice

FibreCRM is a Client Relationship Management (CRM) Software for medium to large accountancy practices. Its one-of-a-kind integration with existing practice management systems creates a powerful relationship management platform. Complete with built-in onboarding processes and in-depth client data reporting.

"We chose FibreCRM's Client Relationship Management solution to connect together our line of business apps and help us manage our client relationships efficiently. The decision was driven by FibreCRM's knowledge of the accountancy sector and its nuances together with its focus on client facing solutions that make our Partners' lives easier."

MOORE Kingston Smith

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www.fibrecrm.com

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- Keep in Touch
- Project & Case Management

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THE INTEGRATED & AUTOMATED PRACTICE

FibreCRM is central to creating stronger client relationships and is the heart-beat of any modern practice. Information is fed from, and to, the practice management software so that **client data can be used effectively without double-entry.**

Create, automate & schedule a wide range of internal workflows & external communications - seamlessly integrated with a variety of popular third party systems.
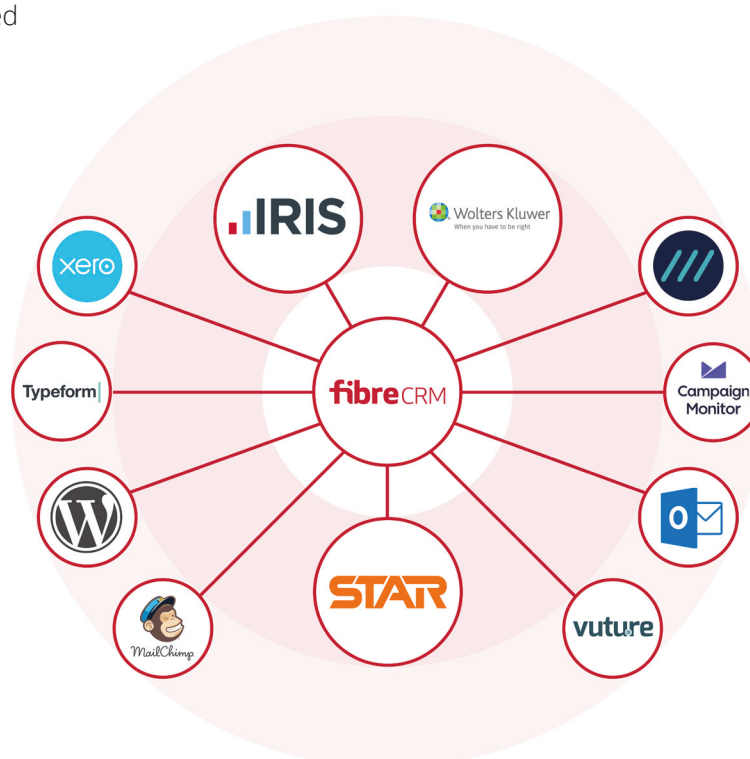
SURFACING CLIENT DATA

FibreCRM recognises that many practices have multiple, independent client data silos that only work when all that information is painstakingly cross-referenced by hand. When fully integrated with practice management software, FibreCRM can do the heavy lifting. Access data and create a variety of reports that are essential to understanding the practice and its clients.

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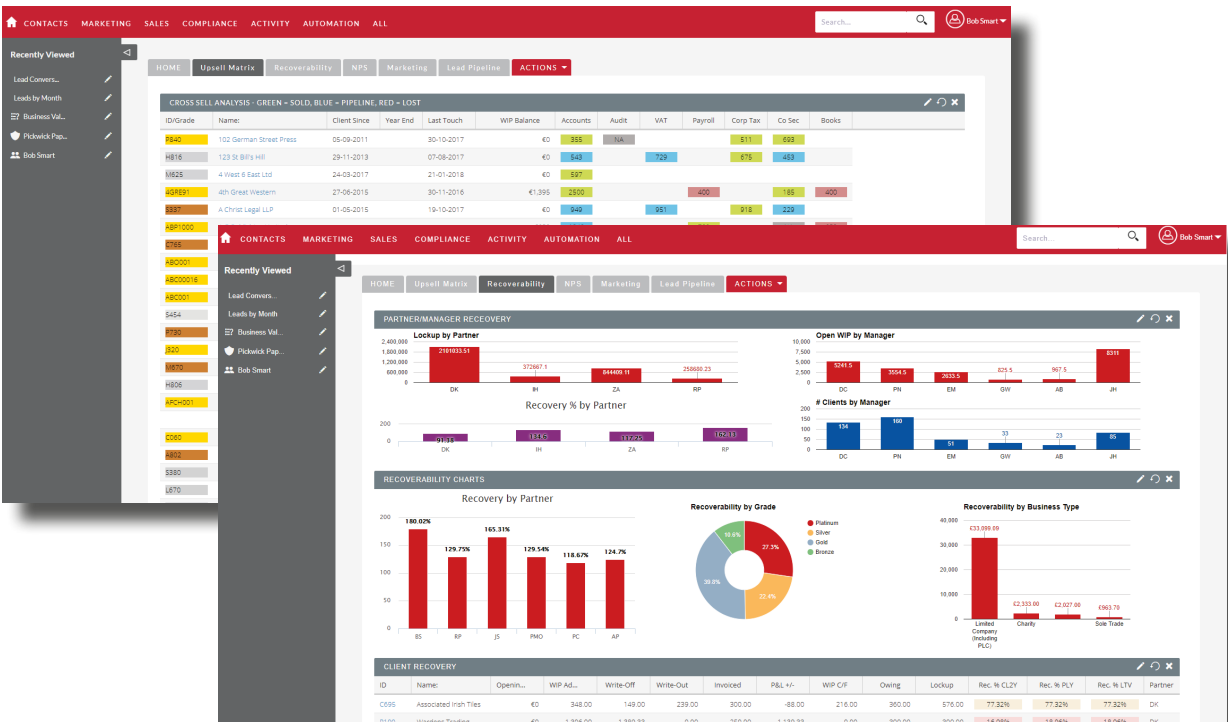
REPORTING

Reporting is a valuable tool in FibreCRM as users can gather data from various modules to generate vital information for their organisation. Report Manager allows users to build, generate, and manage reports for modules to give visibility across the practice. Automatically segmenting client data to generate targeted lists for more personalised marketing campaigns.
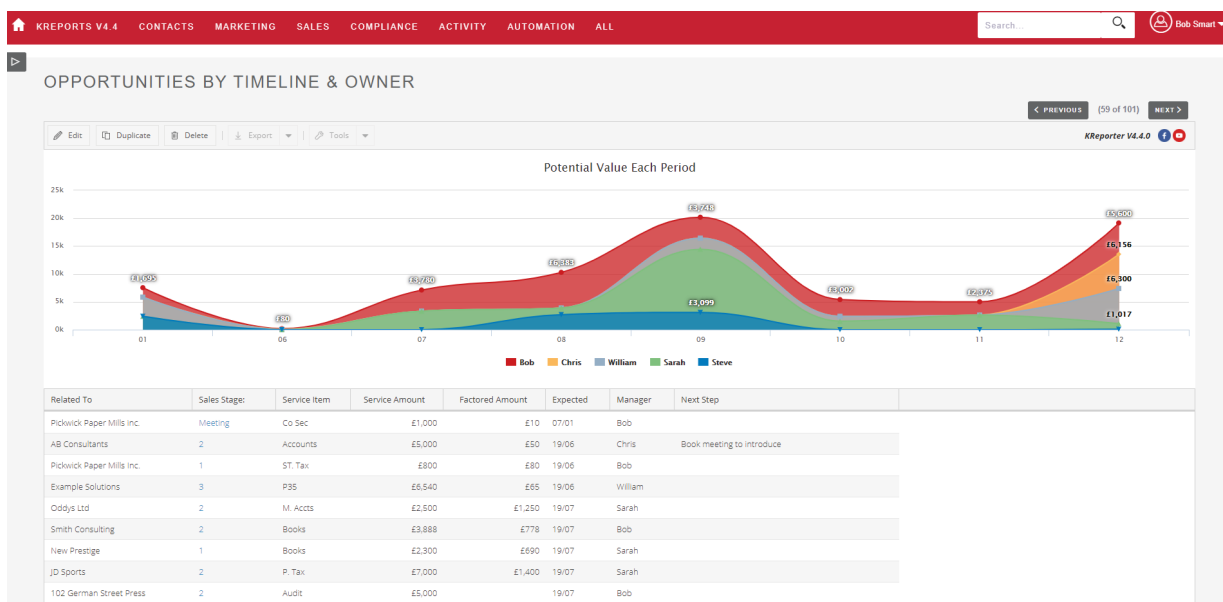
SALES & MARKETING

Create personalised highly targeted client communications and email marketing campaigns supported by integration with marketing systems such as Campaign Monitor, MailChimp, Vuture & Mautic

Promote and coordinate events as well as manage newsletter subscriptions with GDPR compliant opt-in/opt-out functionality.

Post-campaign reporting tools monitor open rates, CTRs and campaign engagement to better understand what clients are responding to.
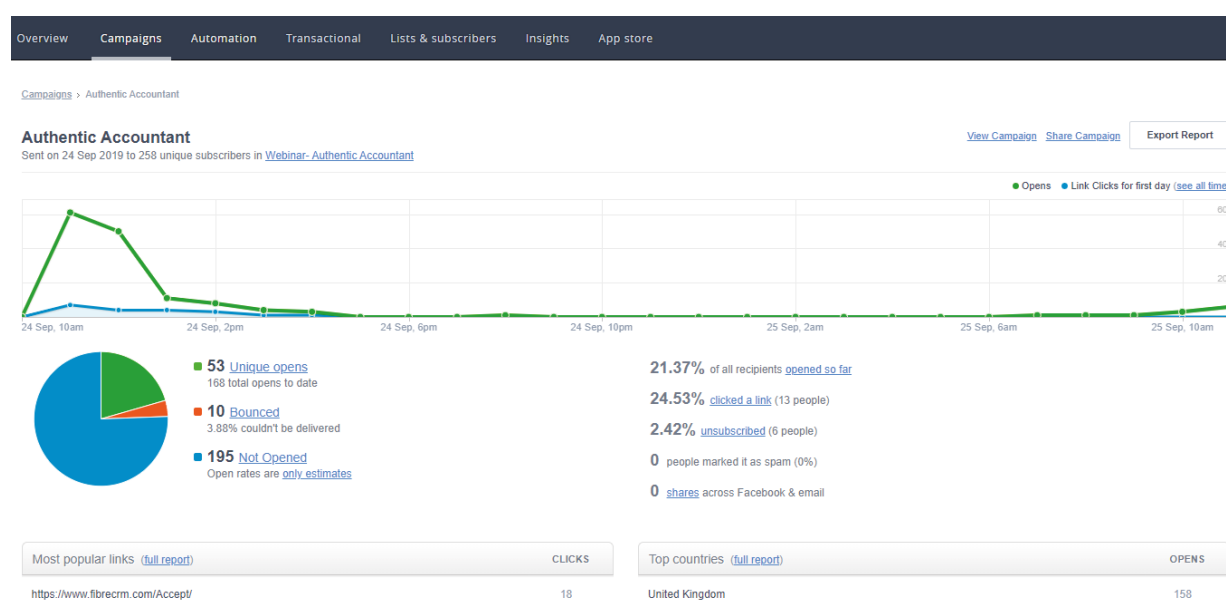
BUSINESS DEVELOPMENT

FibreCRM is at the heart of a practice's business development activity. Helping to sell advisory and manage compliance activities. CRM keeps all sales opportunities, communication and professional referrers together in one place so that the entire practice has one version of the truth. No need to maintain out of date, often inaccessible, spreadsheets.
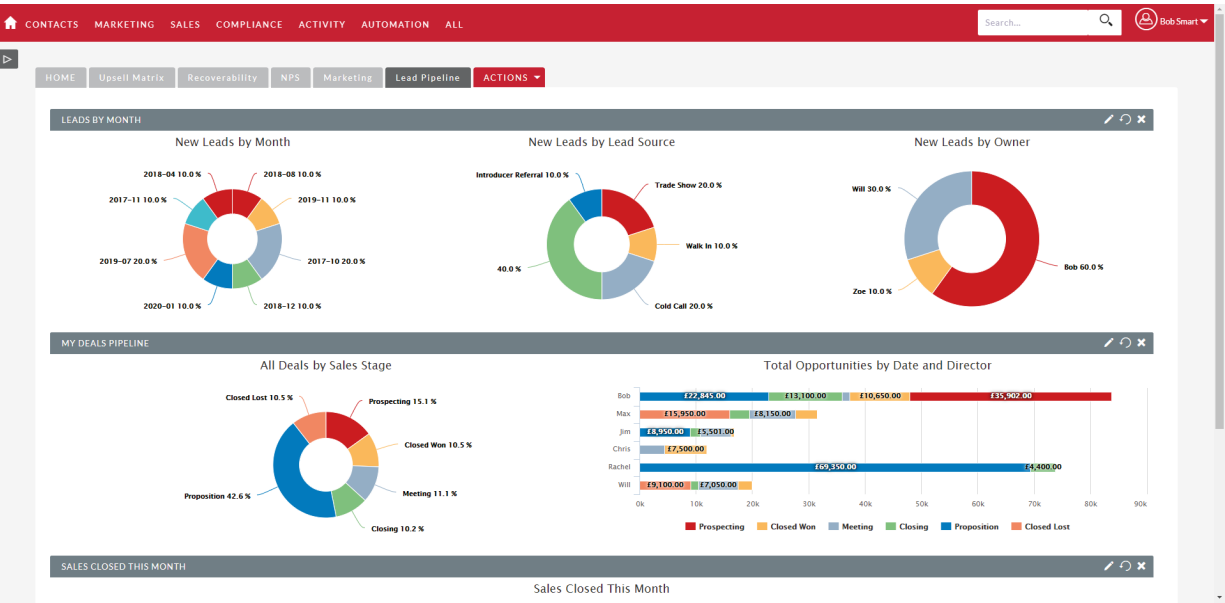
CLIENT ONBOARDING

FibreCRM follows and streamlines the client onboarding processes, gathering all the necessary information and prompting onboarding teams for any missing data.

Identify gaps and delays in client onboarding process using FibreCRM reporting tools to monitor and analyse job turnaround times.

COMPLIANCE & CHECKS

All the required checks during the onboarding process can be streamlined. "Know your Client" (KYC) & Links to popular Anti Money Laundering (AML) systems are all built in.

Automated email and SMS alerts and can be triggered when data is submitted by the client and tasks instantly assigned to team members responsible for the next stage – drastically reducing the onboarding timescale.

SmartSearch///

CYBER ESSENTIALS

- Client Portal for data capture
- KYC Forms with risk assessment
- Conflict checking
- AML checks
- Integrated with SmartSearch

CLIENT ENGAGEMENT & REFERRALS

Drive more sales by spotting gaps in service and adopt industry-leading sales engagement strategies via FibreCRM's unique up-sell/cross-sell analyser.

Having one place for all sales activities helps ensure clients are not neglected and no sales opportunity is ever forgotten.

- **Automatic reminders to call important clients and keep in touch**

- **Build a network of contacts and easily send personalised messages**

- **Visualise your sales pipeline**

- **Spot gaps such as which clients and prospects you've not spoken to about your new payroll service**

- **Identify who is engaging with your current marketing activities**
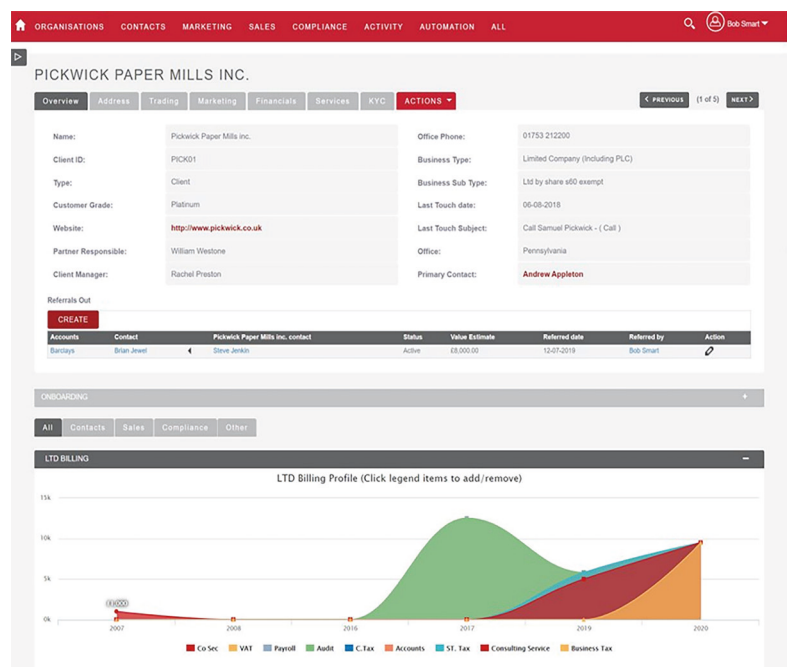
PRACTICE TECHNOLOGY

The FibreCRM platform extends beyond your web browser providing access from Outlook or via a smartphone app and links to Horizon VOIP

CRM Platform

- Based on SugarCRM framework
- Browser-based
- MySQL database
- 128-bit encryption
- Workflow engine

Data Synchronisation

- ETL technology
- Direct database-database synchronisation
- Near real-time sync
- Hamachi Private VPN tunnel

Data Sync with Practice Management

- Names & addresses
- Extra fields
- Budgets
- Services/Assignments
- Responsibilities
- Involvements

Cloud Servers

- UK-based hosting
- ISO27001 information security approved
- Firewalls

GDPR Toolkit

- Consent management
- Escalated privileges
- DPO Role
- Auto-delete records
- Subject Access Requests
- Erasure Requests
- Data Breach Register

Outlook add-on (optional)

- Supports Microsoft Office 2010-2016 & 365
- SQLLite
- Citrix environments

Smartphone app (optional)
- Apple IOS
- Android Google Play

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