

fibrecrm

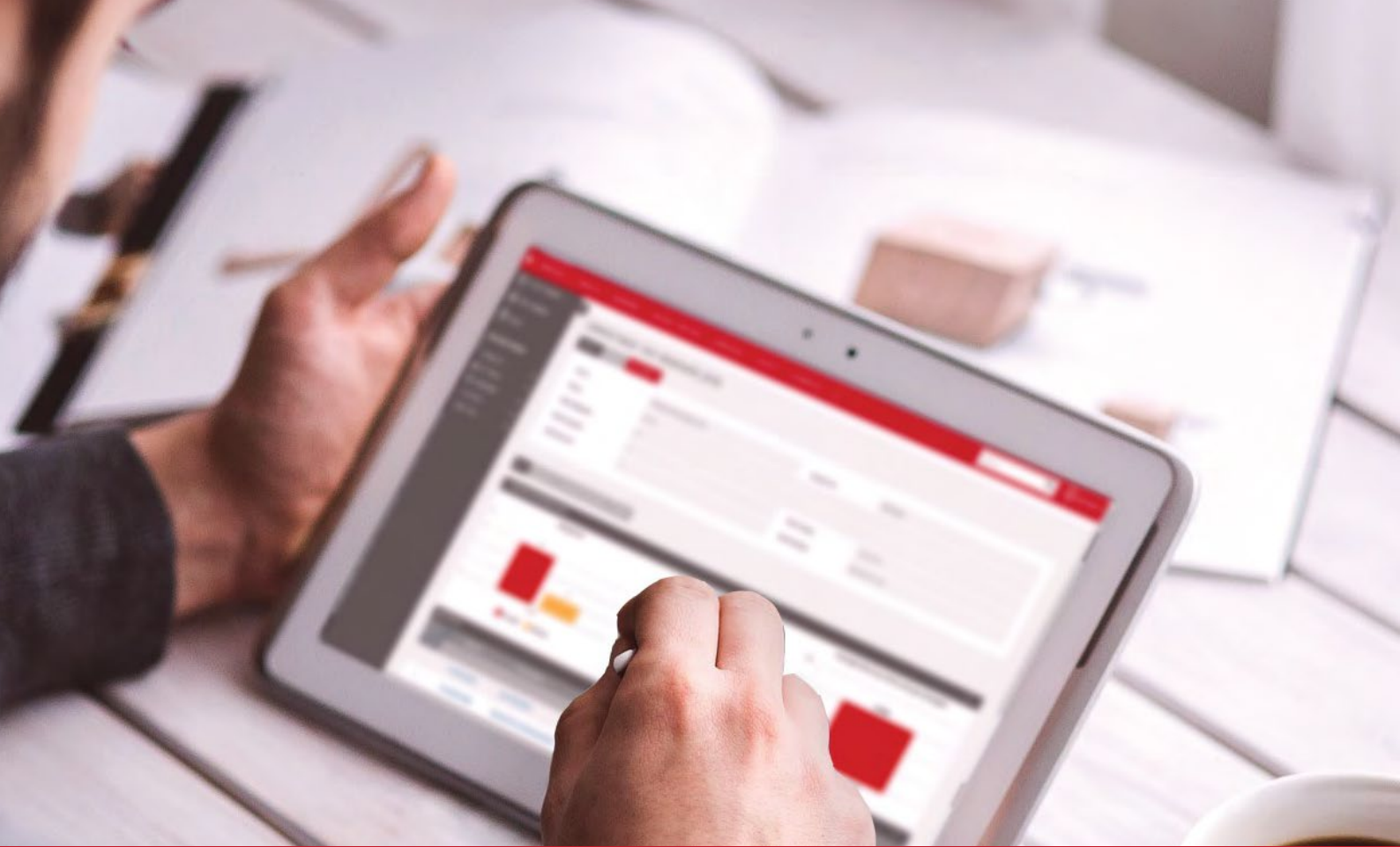
HEART
OF THE
PRACTICE

CASE STUDY

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Dolan Accountancy
Limited company experts



We used to use FibreCRM at our previous accountancy firm, and when we decided to set up Dolan Accountancy in 2017 and our subsidiary Contractor Umbrella, we knew that FibreCRM would help to support our growth.

Prior to our relationship with FibreCRM, our team at Contractor Umbrella relied on heavily manual processes, with no automation, with all of our data stored on separate excel spreadsheets. This was inefficient and disjointed.

FibreCRM has revolutionised the way that both Dolan Accountancy and Contractor Umbrella work and bring in new clients.

Sales Success

At the moment, FibreCRM is predominantly used by our sales team who work on behalf of both businesses.

Having all of our data in one place within FibreCRM, which includes clients who already use both of our services and those who only use one of them, is really handy.

It allows us to segment and target various audiences, such as live clients, former clients and prospects, and create avatars whom we can quickly send targeted emails and digital campaigns to push new services and offers to them.

“ FibreCRM also helps us to better understand where our new opportunities are coming from, by categorising how new leads and clients are secured, whether via digital advertising, email campaigns or direct contact.

Generating sales reports and understanding where new work is coming from allows us to target new opportunities and track sales progress more accurately.

Data Handling

The platform also integrates with our website and imports data from our lead generation forms and call-back requests so that our team can make contact with new prospects while their enquiry is still hot.

For existing clients, it also allows us to create new opportunities for growth by allowing our sales team to quickly follow up on new opportunities highlighted by our accounts and payroll teams.

“ We love how it integrates with IRIS as well. The fact that these two platforms sync so well together means that we can add data to one platform and instantly access it on the other. This saves hours of frustrating manual data entry and updates.

Its integration with IRIS also allows us to quickly and easily send templated chasers and updates to our clients as they complete the various IRIS job stages.

This is really handy, as it automates a process that would otherwise have to be done by our accounts team. This ensures that deadlines aren't missed and helps us deliver exemplary services to our clients.

This has probably helped each member of our accounts team save around 10 hours a week on time-draining administration.

Powering Payroll

Our payroll team also use specialist contractor software called MyDigitalAccounts. We asked FibreCRM if they could create an integration for this platform and they quickly produced an API for us, which has removed a substantial requirement to manually input information for our clients, which has saved our team considerable time.

This produces a whole record for us and stores it alongside the rest of the information we hold in FibreCRM.

We are yet to fully utilise the onboarding features of FibreCRM, but this is also an area of interest where we believe the platform can help us.





Friendly and Approachable

The team at FibreCRM are really approachable and friendly. Marcus and Steven are amazing at solving any problems that we have – they are really on the ball. What's more, they understand us and how we work, which is really valuable to us.

“ *They are always happy to help and have even assisted us with the creation of new reports. They test and check these for us and help us until they are confident that they will work how we require them.*

They have really helped us to save time and the cost of taking on additional staff to deal with administration. Our practice is more organized and we can see where new work is coming from, as well as track year ends and VAT periods more easily. I would have no hesitation in recommending FibreCRM to other practices.