

**fibreCRM**

HEART  
OF THE  
PRACTICE

# CASE STUDY

**Sarah Lake**  
Practice Director



**Knill James has a vision to provide valued advice and results that make a difference to its clients, teams and local communities.**

Understanding our clients' needs is the foundation of success, especially when it is backed up by client care which is second to none and powered by the latest technology.

Although Knill James was founded more than 130 years ago in Lewes, this practice is at the cutting edge of accounting technology and has taken bold steps to integrate solutions that help the firm, and its clients grow.

Despite this focus on technology, the firm has a simple aim to help business get the most out of its expert compliance and advisory services and specialist sector knowledge.

To do this, its starting point is to understand businesses and their challenges to deliver targeted support.

This process has been made all the easier with the integration of FibreCRM, as its Practice Director, Sarah Lake, has explained.





**We undertook research to find a client onboarding solution for our practice that had money laundering and identity-checking functionality in a single piece of software.**

However, we then widened the scope to look for a full CRM that could support our firm's ambitions, which led us to FibreCRM.

Recommended by a fellow member of the UK200 Group, we had the reassurance that FibreCRM would be the right type of platform for us.

FibreCRM is tailorable and configurable and has proved to be a really good fit for our practice. The leadership and development team at FibreCRM have obviously thought through the development and construction of the product to meet accountancy firms' requirements.

## **Onboarding**

FibreCRM has been hugely time-saving in terms of identity-checking documents that we would otherwise be required to obtain and view thanks to the electronic checks available.

This means that we can spend that time doing other things for the client, rather than just chasing and processing paperwork, which can be a real drag on resources and create obstacles for clients.

**“ We want to take as much pain away from our clients as possible and make the onboarding as quick as possible so that we can just get to work and start working for them. So, the fact that FibreCRM had the integrations that we needed via CCH and the identity-checking software was very important to us.**

Fibre's two-way sync with CCH practice management, in terms of sending and receiving data, has also been a massive win for us. It has removed the drudgery of rekeying information out of one system and into another, which as we all know, is the bane of the life of anybody who has a professional services or office job.

## Visibility

I think having immediate visibility on any given day of our lead pipeline is really beneficial to us. It helps us to understand who is talking to which clients and how close each of those leads is from converting.

By having this information, we have a better idea of what more is needed to win that client and where we are in the process.

- Have we made a proposal?
- Have we gone in and done a presentation?
- Are we just at the 'having a cup of coffee stage'?

This gives us a far better idea of our pipeline and allows us to forecast our growth and make sure we can resource the departments where we anticipate considerable new work.

**“ It also really helps us to create tailored marketing campaigns to push on certain areas. Once we launch a campaign, the campaign monitor and mailing functionality within FibreCRM allows us to track the success of our activities.**

- Has our marketing email been opened, and clicked on?
- If so, how many times?
- What's generating interest?
- What topics are of interest to our clients?

## A change of approach

Before we started working with Fibre, our information and data were in various silos – it wasn't all in a single, easy-to-access place.

Now all of the information is at our fingertips for all partners and directors, so we have better oversight and management of our onboarding and client management.

Nothing is sitting on a post-it note on a desk or stuck in someone else's diary. If an appointment is made to meet with a client and someone can't make it, it can be easily rescheduled.





It has also really altered our reporting. Partners can sit down at the end of the month and look at some really good data. Because these days it's all about data. Before we had Fibre, because we had these pockets or silos of information it was time-consuming to bring that all together in one place, check it for accuracy or remove duplicates. All of that pain now has been taken away, which is fantastic.

From a business development point of view, the staff who are out there trying to win over new clients, I think they definitely have more time to be able to focus on their campaigns and to track the success of those campaigns with the onboarding solution.

## Implementation

It was great that FibreCRM follows a best practice project management approach, using a project management tool, where we could:

- Share information
- Be made aware of deadlines
- Track issues
- Mark work completed

**“** *The interaction and sharing of information went well and nothing was insurmountable or unexpected from the team at Fibre.*

In terms of the coordination, exchange of information and level of knowledge of the product, we were extremely happy.

I think this is a platform that many accountancy firms could benefit from. To make it a success, you do need to invest a little time but you will get much more benefit from FibreCRM if you do that.

Out of all the products that we've seen, it can genuinely claim to be an excellent fit for firms such as ours.

A lot of products try to say that they can meet the needs of any kind of business, but they're very broad generic pieces of software. However, FibreCRM is such a strong product and the team there can stand behind their claims. The product stands up to scrutiny.



*Any practice can benefit from using this, and I would definitely, strongly urge them to look at it.*