

7 Strategic Advantages Service Organizations Realize with CRM for Professionals™, built on Microsoft Dynamics

Make the most of your data and resources to set your business apart and grow profits



- 1** Build client lifetime value
Strengthen client relationships with consistent service and personalized communication. Use data analytics to uncover additional revenue potential.

Firms using CRM achieve EBITDA of 13.4% versus 11% for those who do not.

- 5** Uncover new markets and cross-sell opportunities
Use data analysis to better understand your clients, identifying untapped industry segments and indicators of cross-sell opportunities with existing clients.



Businesses that are technology leaders achieve **15% FASTER** annual revenue increases than slow adopters.

- 3** Increase utilization and profitability with data-driven decisions
Model engagement profitability directly within the opportunity screen. Dashboards tap centralized project information to monitor KPIs and bring attention to trouble spots.



- 6** Enable succession planning to protect the future
Document client interactions to support succession planning and enable long-term growth. Monitor satisfaction to make sure clients feel they are receiving value add from services.

Businesses that measure engagement are **24%** more likely to have employees who rate themselves as highly engaged.

- 4** Nurture relationships through automated marketing
Engage more personally with relevant content delivered through targeted, multistage marketing campaigns.



- 7** Take a strategic approach to talent management
Attract professionals with the skills and experience that differentiate your services with Applicant Tracking™. CRM for Professionals™ keeps staff connected to coworkers, clients and the information they need to succeed.

45% lift in lead generation ROI for organizations that nurture their leads



Call us for a consultation or more information
561-847-7717 or info@templetonsolutions.com
www.templetonsolutions.com

