

The background features a network diagram with several human icons connected by lines, set against a dark blue gradient. A large green rectangular area is overlaid on the left side of the image, containing the main text and logo.

# Customer Intelligence For Professional Services

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Become the 'Firm of the Future' through Customer Intelligence to Find, Win and Grow your business





# The Firm of the Future

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Do you consider your firm to be on the cutting edge of innovation and efficiency? Do you feel confident that you're making strides to invest in the right technologies in order to offer the evolved services that clients are looking for in 2022?

Top firms are confidently investing in Customer Intelligence to innovate and expand their offerings, tap into relationships across their organizations, serve clients better and, of course, grow revenue.

## What is Customer Intelligence?

Customer Intelligence is accurate, actionable insights about your customers that enable you to find, win, and grow your business faster.



# Customer Intelligence



# Is All About Knowing

## But what is a Customer Intelligence Platform?

“Customer Intelligence platforms capture and deliver the data foundation, relationship insights and actionable intelligence required to help companies build, measure and leverage their greatest asset: customer relationships.”





## Why do firms require Customer Intelligence now more than ever?

It's no understatement that the world has changed and there has been and will be constant disruption. By focusing on Customer Intelligence, organizations can respond to the effects of:

### **AN ECONOMIC RECESSION**

A convincing 70% of leading academic economists predict the US will tip into a recession in 2023, and since the start of 2022, 10.2 trillion dollars of people's wealth has been shed from the S&P 500. Although whether we're in or on the brink of a recession is still in debate, the vast majority of organizations are acutely focused on protecting their business and preparing for downturn.

### **MERGERS AND ACQUISITIONS ACTIVITY**

In a recent KPMG survey, 50% of executives say they are seeking access to new products, services and technologies through M&A. When companies merge, their combined databases open up a world of opportunities if the client data can be trusted.

<sup>1</sup> <https://futureforum.com/wp-content/uploads/2021/10/Future-Forum-Pulse-Report-October-2021.pdf>

<sup>2</sup> <https://www.pwc.com/gx/en/services/deals/trends.html>

<sup>3</sup> <https://www.marketwatch.com/picks/70-of-economists-in-a-new-poll-say-america-is-headed-for-a-recession-in-2023-heres-how-pros-say-to-approach-investing-in-light-of-that>

<sup>4</sup> <https://www.cnn.com/2022/06/09/economy/americans-wealth-stock-market-housing/index.html>

## MOUNTING PRESSURE

There is constantly growing pressure on revenue generating teams to speed up sales cycles and close more deals, with the same number of resources. When there is not sufficient information in your organization's database, professionals can accidentally target the same accounts in different manners creating a chaotic impression or miss revenue opportunities entirely. A 360 degree client view is imperative when talking to current and prospective accounts.

## INFORMED BUYERS

By the time a buyer takes a meeting, they are already educated in the product or service without ever engaging directly. On average they are 57% of the way through the buying journey . Prospects now expect you<sup>3</sup> to come armed with information about them, their problem and how you solve them.

## THE GREAT RESIGNATION

With remote working here to stay, employees are looking for the perfect life balance. 71% of knowledge workers who aren't satisfied with the level of flexibility in their current role say they'd be open to looking for a new job this year. Organizations need to keep track of internal data and client changes to ensure constant change are recorded.

<sup>5</sup> <https://www.pwc.com/gx/en/services/deals/trends.html>



Given these dire warnings, firms began preparing for a recession early —from hiring freezes and tech stack consolidation, to layoffs and closer analysis of balance sheets. This means that you need to be aware of how recession could, or is already, impacting your clients. Customer Intelligence provides that kind of awareness.

Businesses can benefit from whitespace analysis as their clients seek counsel in trying times, or track key champions that are affected by layoffs, or view the effect of a recession on a firm's valuation. Through economic downturns, firms need to maintain and grow their existing client base to not just weather the storm, but to thrive and accelerate out of the trough.

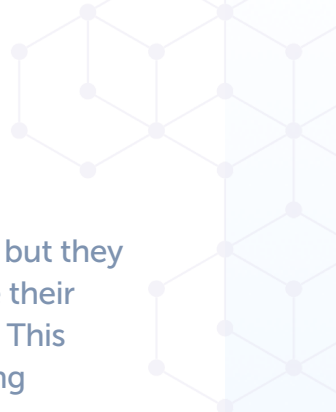
## Change Presents Opportunity

All of this change has culminated in a B2B selling environment that is more complex than ever before. One where it is more important and more challenging to understand your client and deliver on their higher expectations. With that said, with all this change also comes enormous opportunity. Those who have deep insight into their client relationships will be positioned to maximize the value they deliver to them in order to ultimately find, win and grow more revenue.



"A DYNAMIC ECONOMIC ENVIRONMENT, A SHIFT IN VALUES AND NEWLY EXPECTED STANDARDS OF CUSTOMER AND CORPORATE BEHAVIOR ARE RAPIDLY CHANGING THE RULES OF THE GAME. FIRMS WILL NEED TO KNOW THIS NEW CUSTOMER INTIMATELY IF THEY ARE TO SUCCEED IN THE NEW REALITY."

**JULIO HERNANDEZ**  
**HEAD OF GLOBAL CUSTOMER CENTER OF EXCELLENCE**



CRMs are a good first step as they are a powerful tool for organizing client data, but they are often under-utilized and fail to serve their intended purpose as a system of record. This causes firms to face a number of resulting challenges, some of which include:

### **MISSING, INCOMPLETE, INACCURATE DATA:**

Despite the fact that professionals are spending upwards of 5.5 hours per week entering data in CRM, Introhive's data analysis shows that the average consulting firm is missing 219 contacts in CRM *per professional*, resulting in an incomplete, inaccurate view of the client. Operating on an unreliable client data set puts professionals at risk of missing revenue opportunities, mismanaging relationships, and eroding client experience and trust.

### **UNTAPPED CLIENT BILLABLE TIME:**

Tasked with maintaining an accurate record of relationships and client engagements in CRM results in less than a third of professional's time being allocated toward revenue generating activities.

<sup>7</sup> <https://www.forbes.com/sites/kenkroque/2018/01/10/why-sales-reps-spend-less-than-36-of-time-selling-and-less-than-18-in-crm/>



## LACK OF COLLABORATION:

The inaccurate and incomplete dataset found in most CRM systems also results in disconnected teams. Without an accurate client dataset shared between revenue teams, professionals don't have visibility into who is talking to who, or the opportunity to harness this data to conduct whitespace analysis for cross-selling, upselling, and new business generation.

## LACK OF INSIGHTS:

CRM systems on their own are often static data repositories. While client data is essential, in order for firms to deliver superb client experiences, client data needs to be transformed into rich, actionable insights, and delivered to professionals within their workflow so they can build, measure, and leverage their client relationships by practicing insight driven, consultative selling.



## How can a Customer Intelligence platform help your firm get ahead and more importantly stay ahead?

By utilizing a Customer Intelligence platform, organizations can:



Sync, enrich, and maintain client contact and engagement data increasing the quality of data from 65% to 90% and expanding the quantity of contacts from 20% to 70%.



Ensure that the transfer of data is secure and compliant with privacy regulations.



Easily discover “who’s connected to who and how well” across your collective network.



Create a digital network you can tap in to, to make introductions to new clients and grow your existing accounts.



Curate robust, timely client briefing intelligence so you can be more proactive, better prepared to meet with clients, and accelerate time to revenue.



Unlock access to an objective view of client relationships to keep a pulse on client health and client engagement levels.



Deliver rich insights and intelligence directly to the systems that professionals do their work when they need it.



Export trusted, augmented client data into BI systems to conduct advanced analytics that improve performance across the client journey from interest to advocacy.

# What are the benefits of Customer Intelligence?

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## **Those with The Strongest Relationships & Most Information, Win.**

Customer Intelligence enables revenue teams to create momentum in their go to market motion by leaning into customer data and insights that are accessible and delivered organization-wide, rather than a patchwork of data, disparate tools and guesswork. It empowers them to move from guessing to knowing, and to adjust to risks and opportunities within their client base.

## **Customer Intelligence delivers a number of benefits to revenue teams including:**

- Increased lead volume and decreased client acquisition costs by eliminating reliance on cold outreach and tapping into warm relationships.
- Accelerated deal velocity and increased win rates by empowering multithreading, executive alignment, and harnessing rich customer intelligence.
- Improved client satisfaction, loyalty, and profitability by monitoring coverage and engagement levels and identifying growth opportunities.

It's been shown that client-centric companies grow 2X faster and are 60% more profitable than the competition. Client-centricity means having a better understanding of clients, your relationship with them, and their context, so you can deliver more value to them.

# Introhive Customer Intelligence

*Exponential impact across  
the entire client lifecycle*

## **FIND** leads

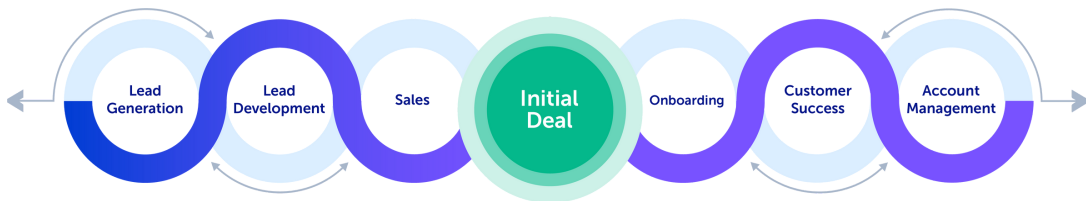
Map existing relationships to engage prospects faster.

## **WIN** opportunities

Increase deal sizes, win rates, and funnel velocity.

## **GROW** accounts

Keep a pulse on client accounts to ensure retention and growth.



**FENWICK**

**\$1M+** in new opportunities of pipeline identified on Day 1



Frazier  
& Deeter

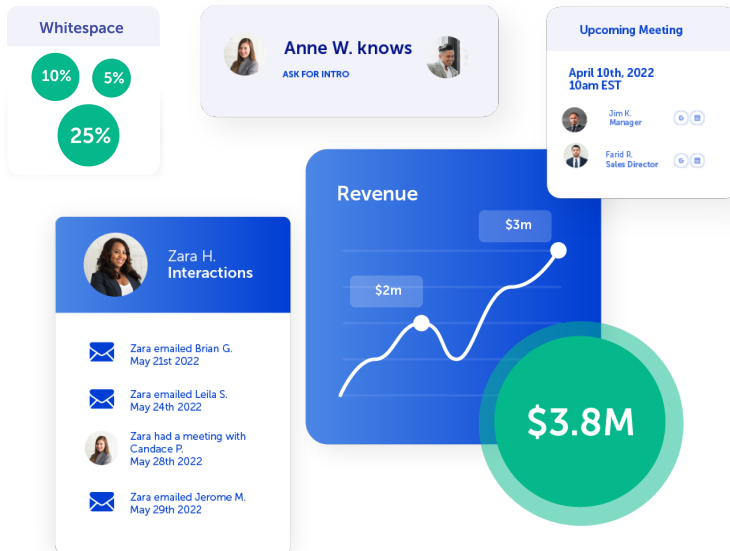
From stale opportunity to closed business in **two weeks** through CEO relationship mapping

**DHG**  
DIXON HUGHES GOODMAN LLP

**300%** increase cross-sell opportunity uncovered from relationship mapping

# Find new business within your existing network.

- Expose the shortest path to new revenue opportunities
- Know when your key contacts change roles, leave the company, or join a new one to pursue and win new business and/or accounts faster.
- Open greenfield market segments with high-closing potential by targeting untapped accounts, industries or regions.
- Quickly reveal who knows who throughout your organization for warm intros and referrals.



# Win more with trusted insight to close more deals, faster.

- Be better prepared to meet with a client with curated data delivered just-in-time.
- Identify internal executives with strong existing relationships for deal alignment.
- Gain sightline into multithreading and influence across departments and seniority levels.
- Optimize productivity and performance by visualizing how sellers are spending their time and recommended next best actions proven to make and exceed plan.

## New Opportunity

Acme - Phase 1



Leo M.  
**CEO**



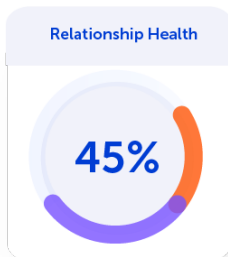
## Next Best Actions

1


No meetings have been logged for this opportunity. Setup a kickoff meeting.


# Grow existing customers into lifetime loyalists.


- Fulfill a client experience that delights and retains
- Stay informed, prepared, and connected.
- Find the next best colleague to assign when your people move on.
- Proactively identify clients at-risk to improve engagement and retention.
- Discover candidates for advisory boards, advocacy activities, and loyalty programs.



New connection discovered

 **Louis Martel**  
Consultant

 97%

 **Caine Daniels**  
Director of Search Marketing

ASK FOR INTRO →

A notification card with a white background and a thin border. It features a title, two profile cards, a bar chart icon, and a green button.

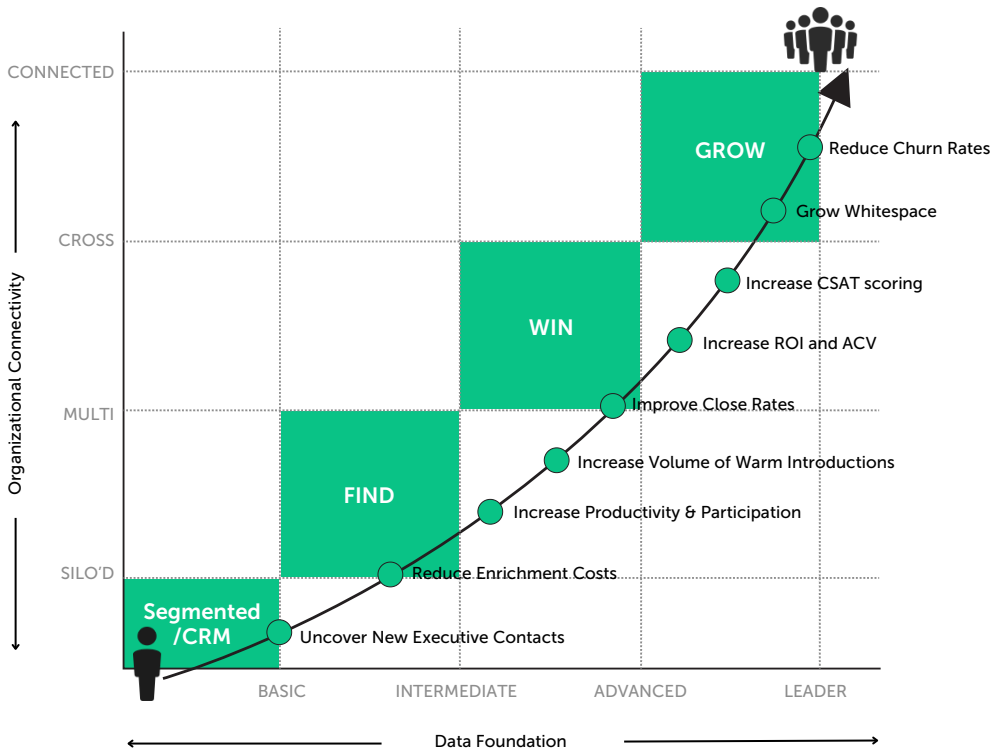
Invitees:

Message:

A blue message card with rounded corners. It contains two text input fields.

# Realize Value at Scale with Customer Intelligence

Introhive partners with our customers on their digital transformation journey to unite data, teams and technology in order to Find, Win, and Grow revenue.





# So why Introhive?

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Security, privacy and trust

Platform built on:



SOC2 Type II  
Certification



Encryption in  
Transit (SSL 2048)



TRUSTe  
Certified



Encryption at Rest



Employee  
Background  
Checks



PIPEDA Compliant



E.U - U.S  
Privacy Shield



General Data  
Protection Regulation



Static Code  
Analysis



Penetration Testing



## Ease and Speed to Value

- ✓ Implementation in as little as 30 days and capture ROI within 3 months
- ✓ Immediate value to end users with time-savings and actionable intelligence that drives revenue
- ✓ Best of breed renewal rates
- ✓ Low lift implementation



## Secure and Built to Scale

- ✓ Committed to Data Security & Privacy
- ✓ GDPR , SOC2 Compliant
- ✓ 100,000 user deployment - Enterprise proven
- ✓ Over 1 trillion transactions processed per year



## Ever-growing suite of solutions

- ✓ Harvest historic contacts, emails, and meetings
- ✓ \$130 million of capital invested in our platform
- ✓ Continuous investment into platform drives innovation
- ✓ Rapidly expanding roster of apps and integrations



## Customer Intelligence

- ✓ Leading Customer Intelligence platform on the market
- ✓ Dynamic scoring algorithms perfected over time
- ✓ Unlock power of business network with who knows who and how well
- ✓ Information where and when you need it to accelerate revenue growth

# Select Customers

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# Case Studies

## Professional services case study

### LBMC Realizes 567% ROI in Time Savings & Enhances Customer Experience Management

#### Firm profile:

- 30+ years in business
- Largest professional services provider in Tennessee
- Top 50 US accounting firm
- 600+ employees
- 10,000+ clients

#### Business Objectives

- Create one centralized database across 9 companies
- Map firm-wide relationships to better track client engagement
- Empower users with automated client intelligence reports
- Increase CRM user adoption to increase ROI

Deployment: 350 seats

Within 3 months of going live:

**250,500**

relationships identified, scored and mapped into CRM

**\$197,115**

total ROI in \$ from time savings, equating to a 567% return

**77,967**

# of new contacts identified for marketing & business development

**876**

total hours saved for billable professionals



“

**Suzanne Reed**  
Chief Marketing Officer

Introhive adds instant value to our end-user professionals in the form of time savings and contributes to the bigger objective of our firm; gathering a holistic view of client intelligence in a centralized repository.”



# Frazier Deeter Gains Six-figure Return on Investment in 3 Months with Introhive



## Firm profile:

- Nationally recognized CPA and advisory firm
- One of the largest growing accounting firms in the USA
- 40+ years in business
- Top 50 US accounting firm

## Business Objectives

- Ease the manual marketing process
- Ease list management pain
- Improve data input
- Lack of quality contact data

Deployment: 350 seats (accountants and partners)

Within 3 months of going live:

**\$200,000**

return on investment from automation & practitioner time saving

**7,900+**

new database contacts identified and mapped to CRM

**31,000+**

relationships mapped across key client accounts

“



**Adelle Erdman**

Executive Director of Marketing

With Introhive, the process of identifying who knows who at key accounts is automatic. That's a big win for our firm because we are reaching clients and prospects that we have missed out on for all these years, while simultaneously reducing workload for the partners, as well as marketing."



## 300K Cross Selling Win from Introhive Intelligence

### Customer story

John was meeting with a client and the morning before the meeting he received the Introhive pre-meeting preparation relationship intelligence email. Introhive identified that the CFO had recently departed from the organization he was about to meet with. Armed with this insight, during the meeting he proactively asked the client if they needed advisory assistance during the transition period.

### Result

Within four hours he was able to cross-sell 300k of new work into this existing client, increasing the client from under 100k in billable hours to over 400k.



“

**John Roberts, Managing Growth Partner**

Every day I'm asked why Introhive has been a game-changer for the Accounting industry. It's because of everyday revenue-driving use cases like this as a crossing selling and industry growth are crucial for the "firm of the future".



## 250K Win from Introhive Connectivity Data

### Customer story

The team at CohnReznick was able to secure a \$250k win with a brand new client by reviewing their Introhive connectivity reports. The pursuit team was clued in to a relationship that a fellow Partner had in another state with a core influencer on the buy. That partner was a former schoolmate of the influencer. The partner reached out to his schoolmate and told him about the Firm, and the pursuit team asked for a recommendation to the buyer.

### Result

This simple step secured a 250k win and CohnReznick would not have been able to put those relationship dots together without Introhive.



**Erin Connolly-Kriarakis**  
Chief Marketing Officer, CohnReznick

We are improving our visibility into all of the connections we have as a firm, and we are able to now show both sales and marketing touchpoints from target to opportunity, measure cost of an opportunity and so much more. We can have a smarter, more efficient and profitable sales cycle for all our business lines."





## Generates 40% More Relationships With Introhive

### Customer story

Colliers International's operations span 69 countries and boasts a workforce of 12,000 strong. In order to provide clients with insightful ideas that accelerate sales, Colliers International looks for sophisticated and innovative technologies to manage their client relationships. With efficiency, adoption, better data, and increasing contacts as top priorities, Collier's focused on increasing broker efficiency and data quality, Introhive tracked every aspect of their client relationships with zero manual data entry or management required.

### Result

After implementing Introhive's Customer Intelligence platform, Colliers International in Canada saw a 40% increase in client relationships generated and activities tracked, enhancing and adding to their existing client data.



**Neven Bradasevic**  
Business Success Manager, Colliers  
Canada

"It was a constant challenge to have our users remember to track their meetings, calls, and contacts to CRM. Our users either saw it as a hassle or simply forgot to do it. Introhive's email scrub to identify relationships was really innovative. We never looked at our emails before as a source of relationship data."



**40%**

more generated  
revenue

**3,606**

contacts automatically created

**25,100**

emails automatically  
tracked and logged



## Fostering a SalesMindset with the Help of Introhive



### Customer story

Progress on initiatives was being hamstrung by inconsistent Salesforce adoption, poor data quality and completeness, and a lack of visibility into relationships held throughout the firm. In addition, top-of-funnel awareness and prospecting was subdued with quality high-cost campaigns not reaching tens of thousands of non-subscribed contacts locked in Outlook.

### Aim

- Make it easy to get contact data from Outlook into Salesforce
- Reveal hidden relationships from across the firm
- Make it easy to log sales activities in Salesforce
- Automate pre-meeting research
- Surface Salesforce data to inform client and prospect engagement

### Results

Introhive delivered real-world success in the form of greater collaboration, time savings, an increase in subscribers, and greater more consistent use of Salesforce. The ROI and behaviour change Grant Thornton Australia initially saw took the firm from 50 users to a full rollout of 200 users.

“



**James Fielding**  
Head of Sales Enablement, Grant Thornton, Australia

"We're focused on fostering a sales mindset that enables our people to win great work for great clients- helping to build sustainable practices and grow the firm. We want to see our people confidently going to market with an intent to add value, while being true to our values."



## 130K Win from Introhive Connectivity Data

### Customer story

Bennett Thrasher was presented an opportunity to win the business of a very large restaurant chain that the team had been pursuing. With the opportunity in hand, Johns first move was to use Introhive customer and relationship intelligence to reveal any intel or relationships they had on the prospective client. Lo and behold, a staff accountant with 2-3 years experience at the firm had a connection at the restaurant chain that ended up connecting and triangulating relationships.

### Result

The win led to an approximate \$130k annual engagement for Bennett Thrasher.



“

**John Cummings**  
Partner, Bennett Thrasher

We would have sent out an email blast 'does anybody know xyz restaurant chain' and it likely wouldn't have been responded to by the person that did have the relationship. Introhive uncovered the connection and I reached out to that person here at Bennett Thrasher who then pinged the staff accountant at the chain - in turn it was a very successful process."



Visit [www.introhive.com](http://www.introhive.com) to request a consultation



Request a  
consultation  
[www.introhive.com](http://www.introhive.com)

