CCH CRM KickStart for Accountants

CCH CRM KickStart for Accountants is designed to help your practice get up and running with CCH CRM powered by Workbooks – helping you manage and monitor your practice marketing and accelerate practice growth. It is designed give you a basic framework and initial guidance on how to use the software and is most suited to practices of any size who are prepared to dedicate time to understanding the capabilities of the software themselves.

The KickStart for Accountants pack costs £3,700 (plus VAT), in addition to your CCH CRM licence. This provides:

- 1 day Implementation Planning

- 1 day CCH Central Data Integration

- 1 day CCH CRM Implementation

- 1 place on a centrally run, 2-day administrator training course

These days will be provided during the course of implementation and will deliver the minimum needed to get your practice up and running with CCH CRM. Please note that CCH CRM KickStart does not include user training (other than the administrators course mentioned above), any review or housekeeping of your CCH data before transfer, nor any departure from the standard user interface or fields which are included in this package. Additional configuration, consultancy or training will be chargeable at the usual day rates.

Implementation Planning

A successful implementation of CCH CRM will deliver significant benefits to any practice. The purpose of the requirement gathering process is to evaluate your requirements, review the skills and availability of your project team and prepare an outline implementation plan.

The areas covered during requirements gathering will be:

- Evaluating your requirements – including identifying what data you want to work with to get you up and running with CCH CRM

- Agree and document the implementation approach with you

We have standardised the fields which we will make available in CCH CRM as:

- Key contact and client data (name, address, email, phone etc)

- Practice ownership data (client manager, client partner etc)

- Associated contact data

- Pick-list of extra fields and categories

However, there will be data within these categories which will have no relevance to practice marketing and it is important that we agree with you the data categories you wish to work with.

CCH Central Data Integration

We will work with you to ensure that the data you have identified as being relevant for marketing purposes within CCH Central is available in CCH CRM. We would recommend before this process commences that you work through your client and contact data to remove duplications, errors and data which is out of date to ensure the database is as clean as possible. Once this exercise is complete, we will extract a copy of the relevant data into an Excel spreadsheet which you can use to undertake a final data review, making any remaining data edits in CCH Central. Once you are satisfied your data is ready to use, we will run a new data extraction from CCH Central and set it up in your new CRM system, ready to go live. We will also install the data update tools which will ensure your CRM data remains in step with any adjustments you are making in CCH Central.

CCH CRM Implementation

Form Layout

A standardised layout of the CRM system is included within the KickStart pack. This has been created in consultation with practices using CCH Central to ensure it meets the specific needs of accountants.

The layout can be customised, if required, but this would incur additional consultancy fees.

Marketing and Campaigns

CCH CRM consultants will help you get started by creating some simple marketing campaigns and adding contacts to them.

Administrator Training – Two Days

The administrator training course is invaluable in teaching you all the elements you need to know in order to set up and maintain your CCH CRM system. This is an instructor-led, classroom-based course, delivered using a mixture of demonstrations and exercises for you to complete.

On completion of the administrator training course you will be able to:

- Set up your users, giving them the correct access to the records and functionality relevant to their job roles

- Customise CCH CRM to make sure that all data important to you is captured

- Manage how marketing emails are handled

- Format templates so that routine data is displayed consistently, including creating professional documentation that can be sent to your clients and prospects

- Import data from third party sources

- Prepare the system so you can capture interest in your services directly from your website

- Build reports to help you manage and monitor your marketing activities

CCH CRM KickStart for Accountants:
Additional Options

As detailed above, the KickStart pack is designed to get you started with CCH CRM. However, a number of firms have found the following additional items useful for getting the best out of their CCH CRM system. You do not need to take these at the outset but they are worth considering as you progress on your CRM journey.

User Training

While CCH CRM is intuitive and easy to use, user training can fast-track you to getting the most out of your system by explaining the possibilities the system offers, using worked examples and demonstrations. As with all CCH software training, this will be delivered by our Professional Services team in your offices. The number of days training you might need will be dependent on your requirements which you can discuss with your CCH CRM project manager.

Web2Lead Forms

If you use forms on your website to identify interest from potential clients, you might consider configuring CCH CRM to automatically capture their details and create follow-up activities using the Web2Lead functionality.

You can also integrate Google Analytics which enhances the functionality, allowing you to capture information about how visitors arrived on your website. Integration with Google Analytics provides key data about the success of your online marketing activities and the return on investment they are generating.

MailChimp Integration

Many practices use a third party emailing provider to support their email marketing activities. CCH CRM integrates to several such packages, but we recommend MailChimp for ease of use. We can help you set up the MailChimp integration as required.

Import of Prospect Data from Other Sources

Some practices buy in prospect data from agencies or hold this data in existing systems outside CCH Central. If you would like assistance in incorporating such data into CCH CRM we can offer the necessary consultancy to achieve this.

Layout Customisation

The KickStart pack offers a standard layout to make it easy for you to get started with CCH CRM. If you have additional requirements your CCH CRM project manager will be pleased to discuss further consultancy.

CRM Consultancy

If you require ongoing support with the use and application of CCH CRM, please do not hesitate to discuss these, either with your CCH CRM project manager or your usual CCH Account Manager.

Wolters Kluwer

Want to know more?

For more information about CCH CRM or any of the other Wolters Kluwer products and services:

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