



How consulting businesses benefit from Insightly CRM



Consultants need to work smarter

Your consulting business depends on your ability to exceed your clients expectations. Customers turn to consultants for help with operations, sales, marketing, customer service, and more. To complete every new project and build client relationships, you need to work in a way that's fast, organized and always on call— even when your team is as small as one person. Frustrated by information lost within disorganized spreadsheets, more consulting businesses are using CRM to improve workflow, move leads through the sales funnel, improve customer experiences, and essentially regain

control of their businesses. Managing the moving parts of a consulting business requires a dedicated set of tools—which can be found in a CRM's project and contact management capabilities. An independent TechValidate survey found that more than half of Insightly's consulting customers recieved return on initial investment in a CRM within one to three months. In this ebook you'll find additional insights from our survey including tips on how to make the most out of your CRM.



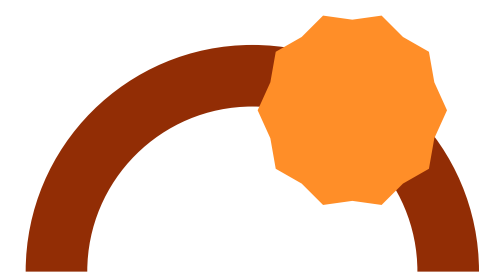
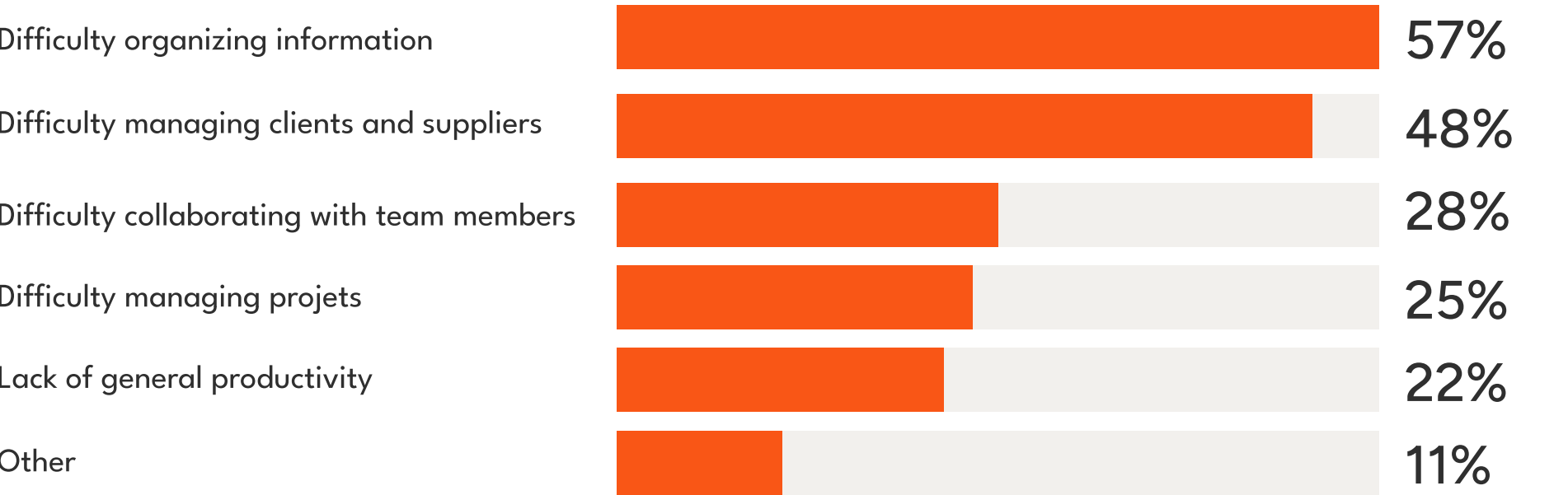
The top 3 priorities for consulting businesses

A survey of more than 750 consultants and consulting companies found, unsurprisingly, that every business had a unique recipe for success— after all, to win customers, consultants need to stand out from their competition. However, a few common priorities were critical in building every business’s steady foundation:

- Productive work, every day on the job.
- A structured approach to project management.
- Lasting client relationships, built on trust.

Consultants depend on upto-date files, records, analysis and communications with clients to provide the service that exceeds expectations and build their reputations. It makes sense, then, that the toughest business obstacle among the consultants we surveyed was a difficulty organizing information. When consultants spend too much time in the weeds, they lose the bandwidth to effectively manage clients, suppliers, and projects.

The top 3 priorities for consulting businesses

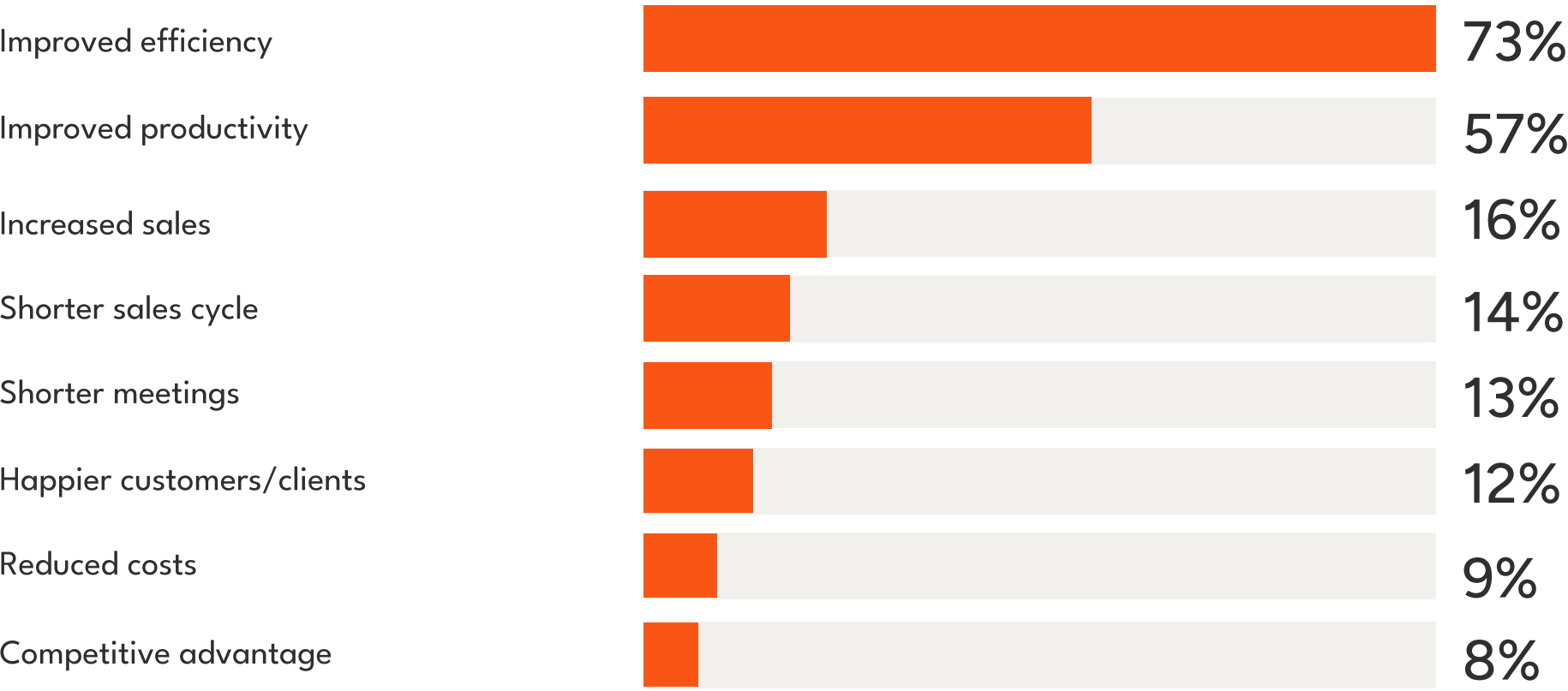


Tackling business objectives: efficiency, relationships, sales



Measuring efficiency is a loaded effort in any industry. With a CRM, consultants can sort clients as projects before connecting related activities, timelines, customer-specific sensitivities, and more. The approach helps bring order to the many moving parts that add up to typical workdays for consulting professionals. By using a CRM to take care of business, consultants can focus on keeping up with the latest technology to remain relevant and competitive. Improving business efficiency with CRM can also positively affect sales—reduce sales cycles, cut time spent in meetings, and reduce overall costs. As a result, consultants can focus on their work with clients, which leads to happier customers and a greater competitive advantage. They can manage client projects from beginning to end, from capturing lead call notes to automatically populating corresponding accounts, all while tracking data and making it accessible for both new and repeat clients.

Business improvements after CRM adoption



Using CRM as mission control

Many consultants report using a CRM as mission control—using the solution to keep prospects in order, track next steps, and ultimately build more productive business processes. 56 percent of consultants surveyed increased productivity by more than 25 percent after using a CRM, empowered by the solution to get their operations, contacts, and customer histories in line. In particular, consultants found the greatest ROI was from using CRM for managing contacts, tracking client fulfillment projects from start to finish, and by integrating a CRM solution with applications like Google Apps, Office 365, and others.

Which CRM features matter most in managing relationships?

- 65% Contact management
- 53% Sales pipeline management
- 27% Application integration with Google Apps, Office 365, & other apps

Other helpful features:

- 23% Mobile CRM app
- 21% Customized reporting
- 19% Integrated product management
- 12% File sharing



“Our CRM gives us the ability to keep tasks on point; to have all the information we need all in one place.”

Survey respondent

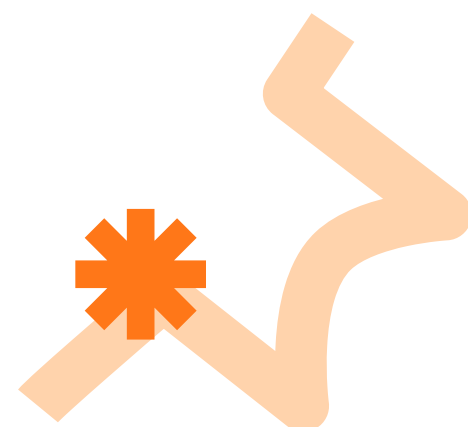
How consultants use CRM to increase sales

As CRM helps to solidify loyal customer relationships and strong business reputations, consultants are able to complete significantly more profitable work. CRM solutions can help consultants assign goals, host training sessions, and provide ongoing customer support—just a few reasons why 40 percent of those surveyed increased sales by 25 percent, or more, using a CRM.



“Our CRM helped us stay on top of opportunities with a long sales cycle; helped improve coordination between business development team members in multiple states; and helped us get a strategic look at our pipeline.”

Survey respondent



With immediate ROI, CRM gives consultants freedom to excel

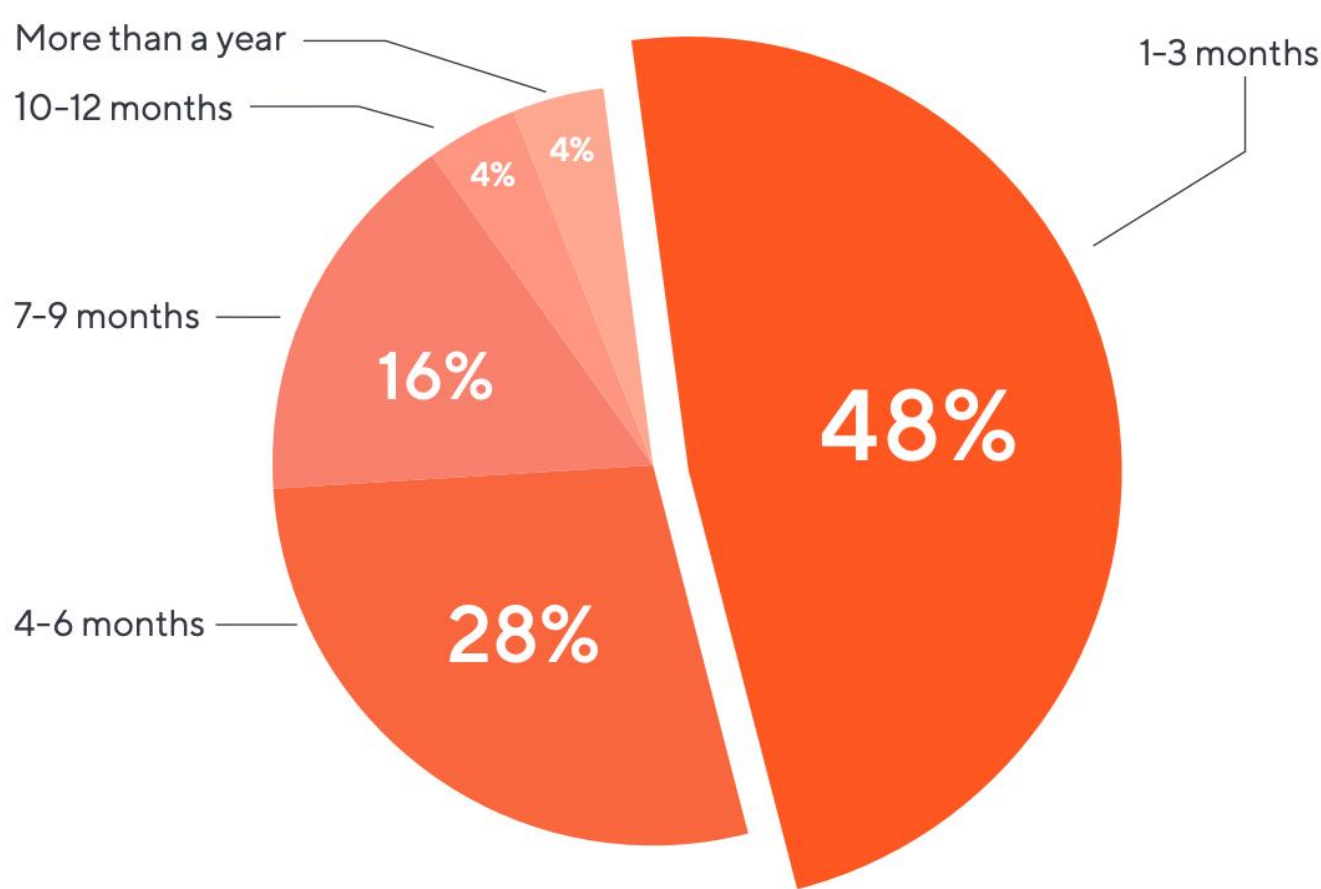
For 37% of consultants, a CRM solution proves its ROI in less than four weeks. Another 30% saw the CRM benefits outweigh its costs within three months, and 95% of consultants calculated ROI from CRM within a year. The reason for this speed is simple: CRM helps solve fundamental pain points that can weigh businesses down and obstruct client service. With these obstacles removed, consultants have the freedom to excel.



“The CRM has been great to have all of the teams’ tasks organized in a format that’s easy to access and view. This has made a good impact on our customer service.”

Survey respondent, small business healthcare company

How long will it take for a CRM to show ROI?



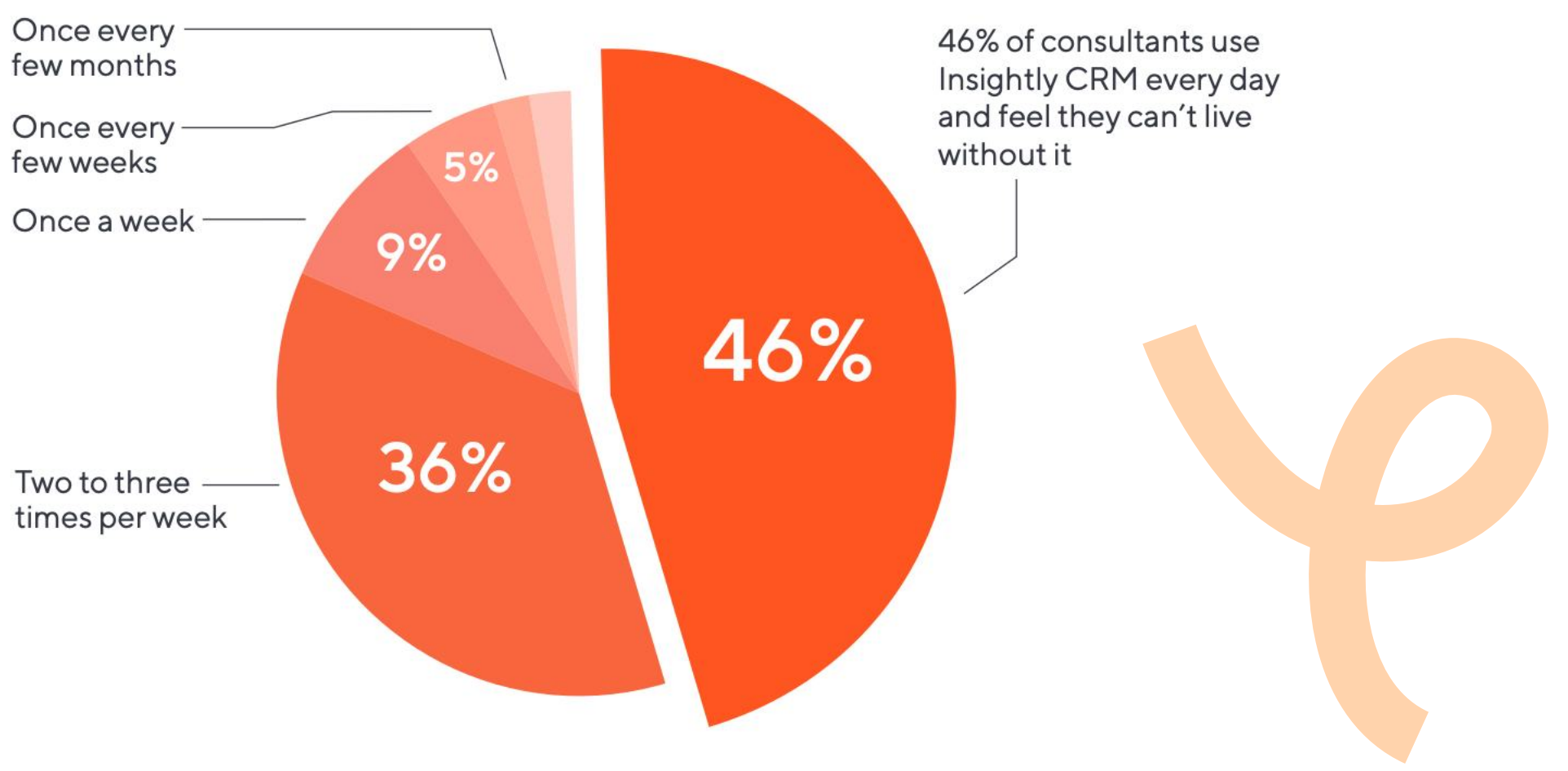
Consulting businesses depend on CRM

The golden rule of clearing away clutter in real life easily applies to business: if you haven't used it in a year, you can toss it. On the other hand, if you're using something every day, its value is obvious. Nearly half of consultants use CRM on a daily basis, going so far as to feel they couldn't operate on the same level without it. Another 36 percent of consultants surveyed use their CRM solutions up to three times per week. If you're considering how your consulting business could benefit from a CRM solution, ask yourself: Are there any tools we're not using? Should we replace them for something we'll likely use daily?

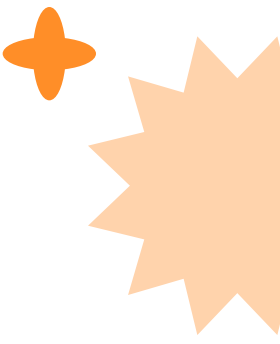
"We were not keeping track of meetings, prospects, or client communication. Because of this we were dropping the ball on follow-ups, or duplicating efforts in some cases, Insightly has helped."

Survey respondent, small business healthcare company

How often do your consultants use their CRM?



Every day, consultants are pulled in multiple directions



Insightly CRM helps consultants regain control of operations, giving them more time to nurture leads through the sales funnel, provide valuable customer experiences, and build a positive reputation for their businesses.

Insightly CRM FAQ

Q: How long will it take for Insightly CRM to show ROI?

A: 67% of consultants saw their Insightly investments returned in less than three months.

Q: How much can a CRM increase our sales?

A: 86% of consultants improved sales by up to 50% after adopting Insightly.

Q: How can improved project management help our company overall?

A: Insightly helps consultants simplify and improve workflow and task management, which makes overall project management a breeze. The system helps track project and client details from start to finish, leading to greater sales conversions and an increased bottom line for the business.



Insightly provides customer relationship management (CRM) software for small, midsize, and enterprise businesses across a range of industries such as manufacturing, consulting, health and wellness, media, and others. With more than 1.5 million users worldwide across 25,000 companies, Insightly is the world's most popular CRM software for Google Apps, Gmail, and Office 365 users.

 Over 1.5 million users

 180 countries worldwide

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