2023 State of CRM at Professional Services Firms Industry Report

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Executive Summary

In November 2022, PipelinePlus conducted the second installment of its market-wide study on Client Relationship Management (CRM) software adoption and utilization in Professional Services firms (and its seventh study on CRM in law firms). This white paper is a continuation of similar studies conducted since 2015. It examines trends in CRM use based on the responses of 251 U.S. Professional Services firms including legal, accounting, financial advisory, AEC, and consulting industries.

Key Findings:

Nearly nine out of 10 Professional Services firms have a CRM platform.

Fewer than six out of 10 seller-doers use CRM at most Professional Services firms. In the legal vertical, fewer than 4 out of 10 seller-doers use CRM.

Fewer than 2 in 10 Professional Services firms rate their CRM as highly effective across critical marketing/BD functions.

Of the seller-doers who use CRM at Professional Services firms, only half use it regularly for sales pipeline management.

More than half of seller-doers at Professional Services firms use Word documents instead of CRM for sales pipeline management.

Seller-doers face little to no accountability for using CRM at nearly two-thirds of Professional Services firms.

About one in five marketing/BD professionals at Professional Services firms cite their two biggest challenges as, (1) low seller-doer prioritization of BD, and (2) seller-doers' lack of coaching to make them effective at/accountable for BD.

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Data Analysis

We asked 251 primarily U.S.-based Professional Services firm marketing/BD professionals to answer a series of questions about demographics, technology platforms, budget allocations, user adoption, ROI, integration, support services, and BD tracking and accountability initiatives.

Survey respondents represented firms of all sizes. We asked them to quantify the size of their firms based on the number of seller-doers (lawyers, accountants, financial advisors, engineers, consultants). 78% of firms have between one and 200 (40% have 1-30, and 38% have 31-200). 17% of firms have 201-700 seller-doers and 5% have more than 700.

Number of Seller-Doers at the Firm

Legend:
- 701 or more
- 201-700
- 31-200
- 1-30
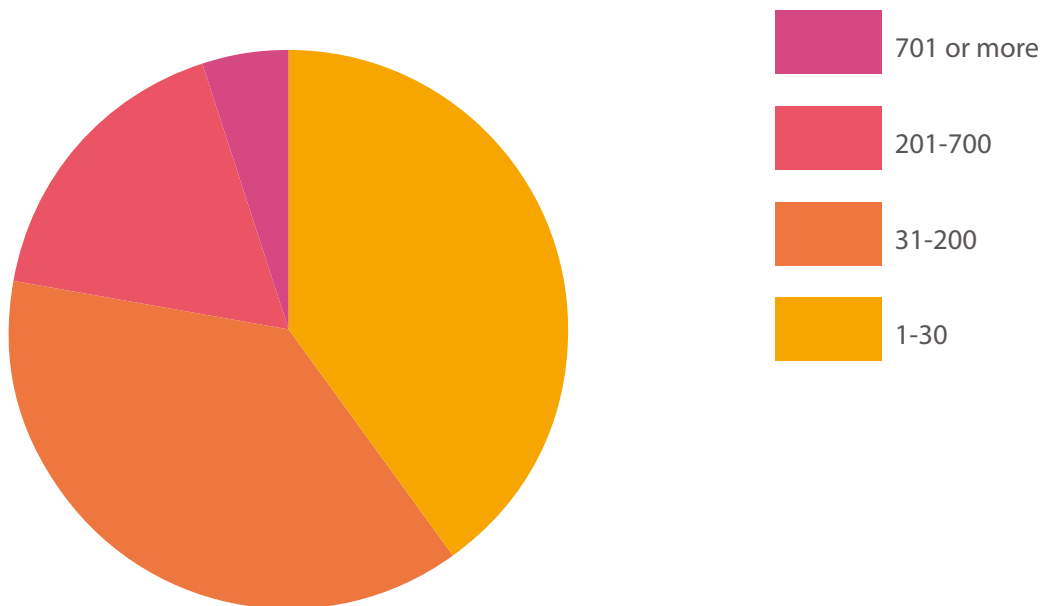
Marketing Budget

We asked respondents to quantify the size of their marketing budgets as a percentage of firm revenue, excluding salaries. The response to this question indicates whether a firm can afford or how much of an investment it can make in CRM.

The greatest number of Professional Services firms (17%) have marketing budgets of 3.5%. Nearly seven out of 10 firms have marketing budgets between 1.5% and 3.5 %.

Marketing Budget
(percentage of firm revenue, excluding salaries)

Legend:
- Don't know/not sure
- More than 5%
- 5%
- 4.5%
- 4%
- 3.5%
- 3%
- 2.5%
- 2%
- 1.5%
- 1%

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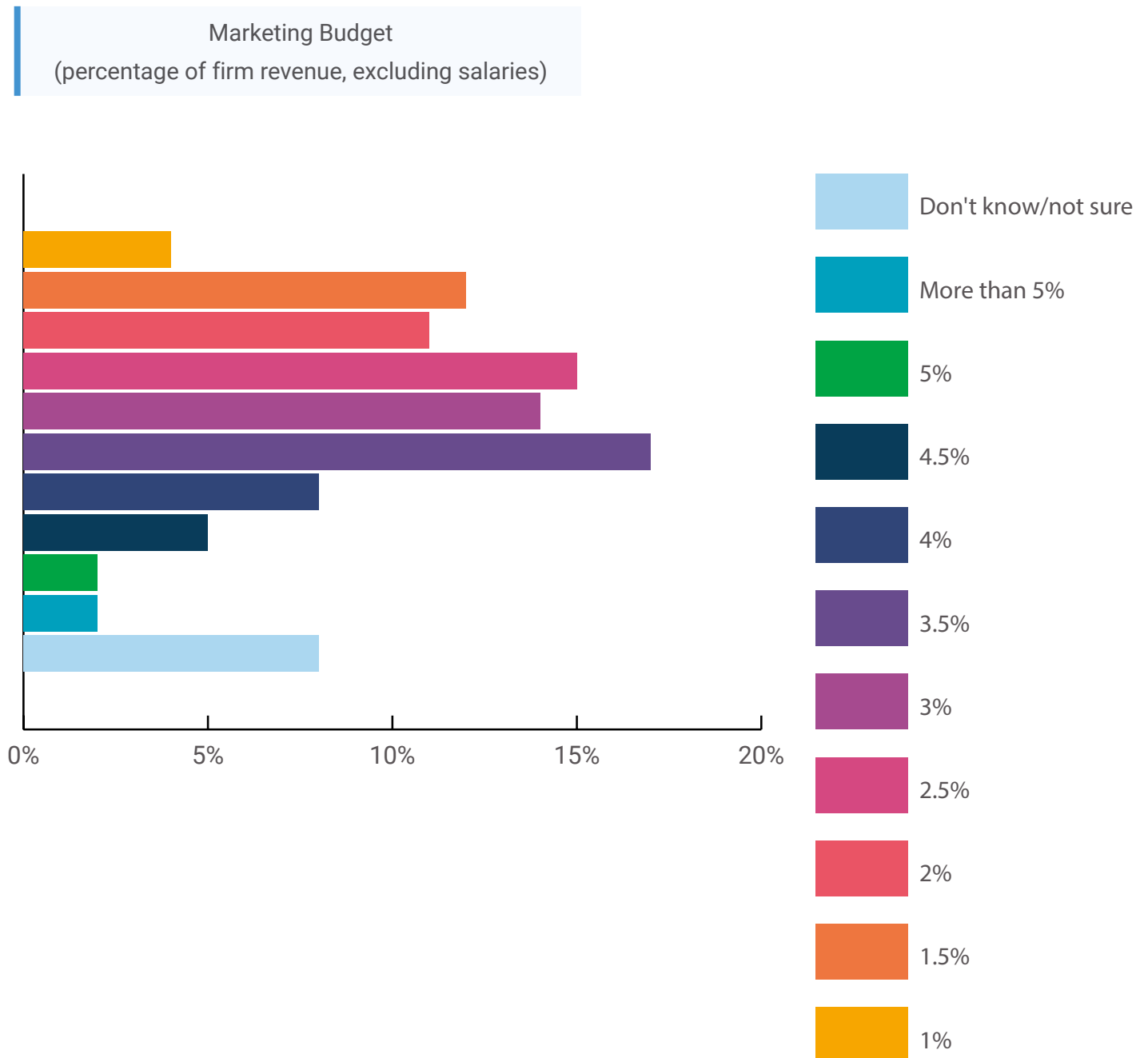
Comparing types of firms, the largest percentage of firms with marketing budgets below 1.5% are consulting firms (7%) and financial advisory firms (6%). The largest percentage of firms with budgets above 3.5% are engineering firms (37%).

Marketing Budget by Industry

Legend:
- Don't know/not sure
- >5%
- 5%
- 4.5%
- 4%
- 3.5%
- 3%
- 2.5%
- 2%
- 1.5%
- 1%

Industries: Law firms, Accounting firms, Financial advisory firms, Consulting firms, Engineering firms

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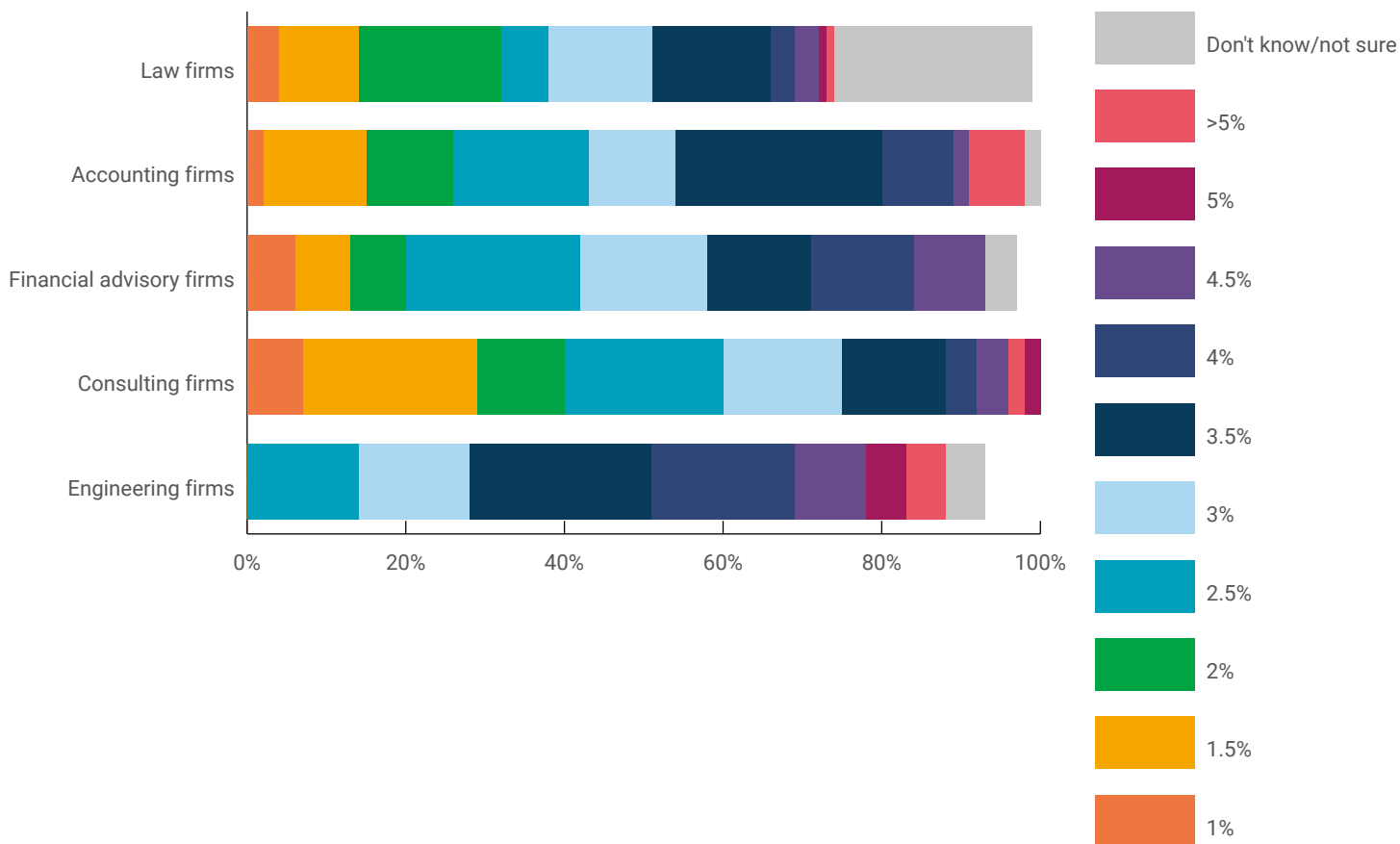
How Many Professional Services Firms Have CRM

According to respondents, 89% of Professional Services firms have CRM. Just 6% of firms say they don't have CRM because they don't need it. The 4% of firms who don't have CRM for a particular reason cite reasons such as no buy-in, limited budget, lack of familiarity with CRM, and inability to find a CRM suitable for their industry. In last year's survey, just one percent of firms didn't have CRM and cited a particular reason.
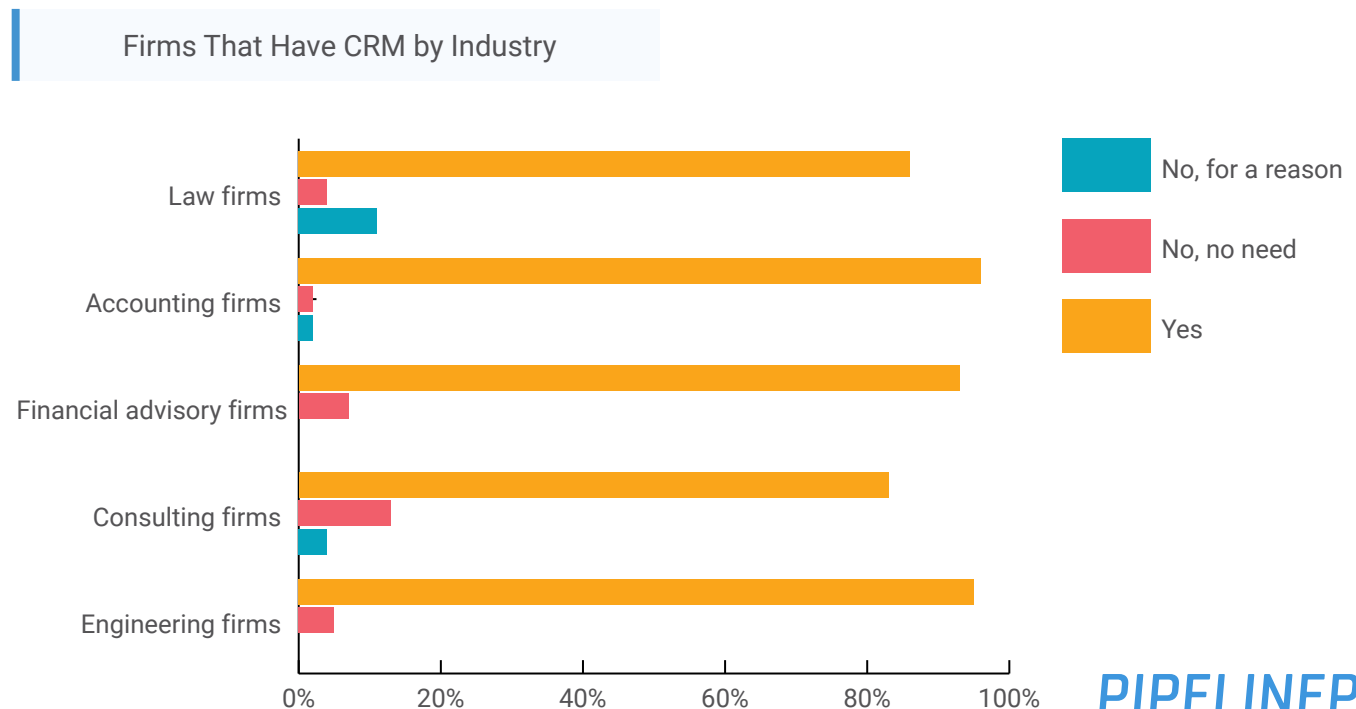
Firms That Have CRM

Legend:
- No, for a reason (i.e., insufficient budget)
- No, we have no need for CRM.
- Yes
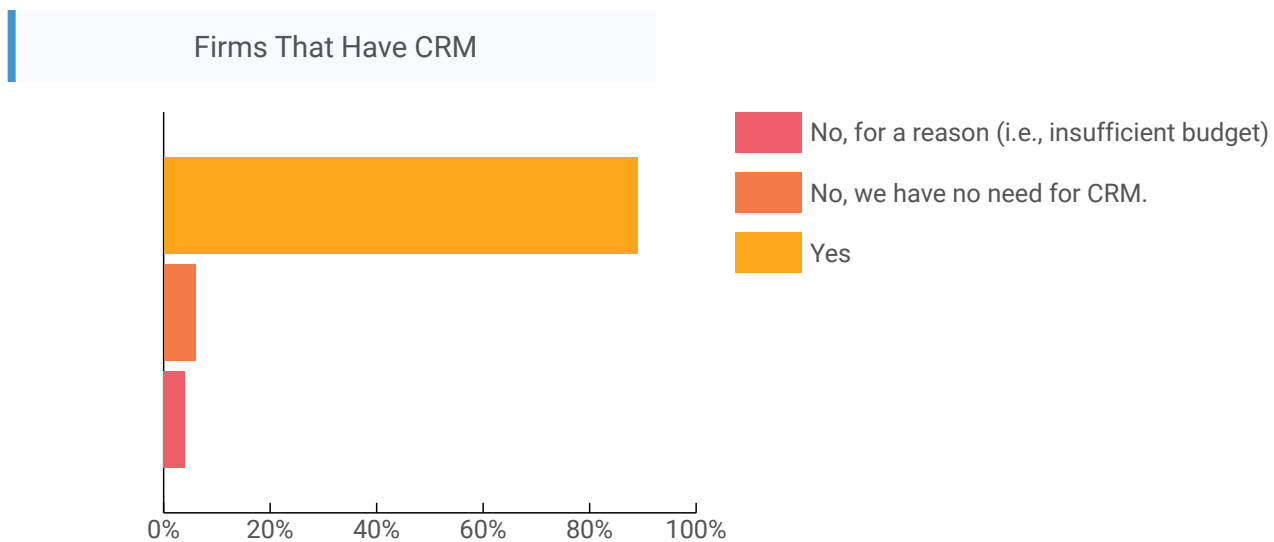
Of those firms who report they have no need for CRM, consulting firms make up the highest percentage (13%) and accounting firms the lowest (2%).

Firms That Have CRM by Industry

Categories: Law firms, Accounting firms, Financial advisory firms, Consulting firms, Engineering firms

Legend:
- No, for a reason
- No, no need
- Yes

The Types of CRMs Professional Services Firms Have

Of 28 types of CRM, both industry-specific and industry-agnostic, 38% of firms use agnostic options (HubSpot, Microsoft Dynamics 365, and Salesforce combined).

The top three CRMs cited by each industry are as follows:

Law firms – InterAction, Contact Ease, HubSpot

Accounting firms – HubSpot, Pipedrive, Keap

Financial advisory firms – Keap, Wealthbox, Intapp OnePlace
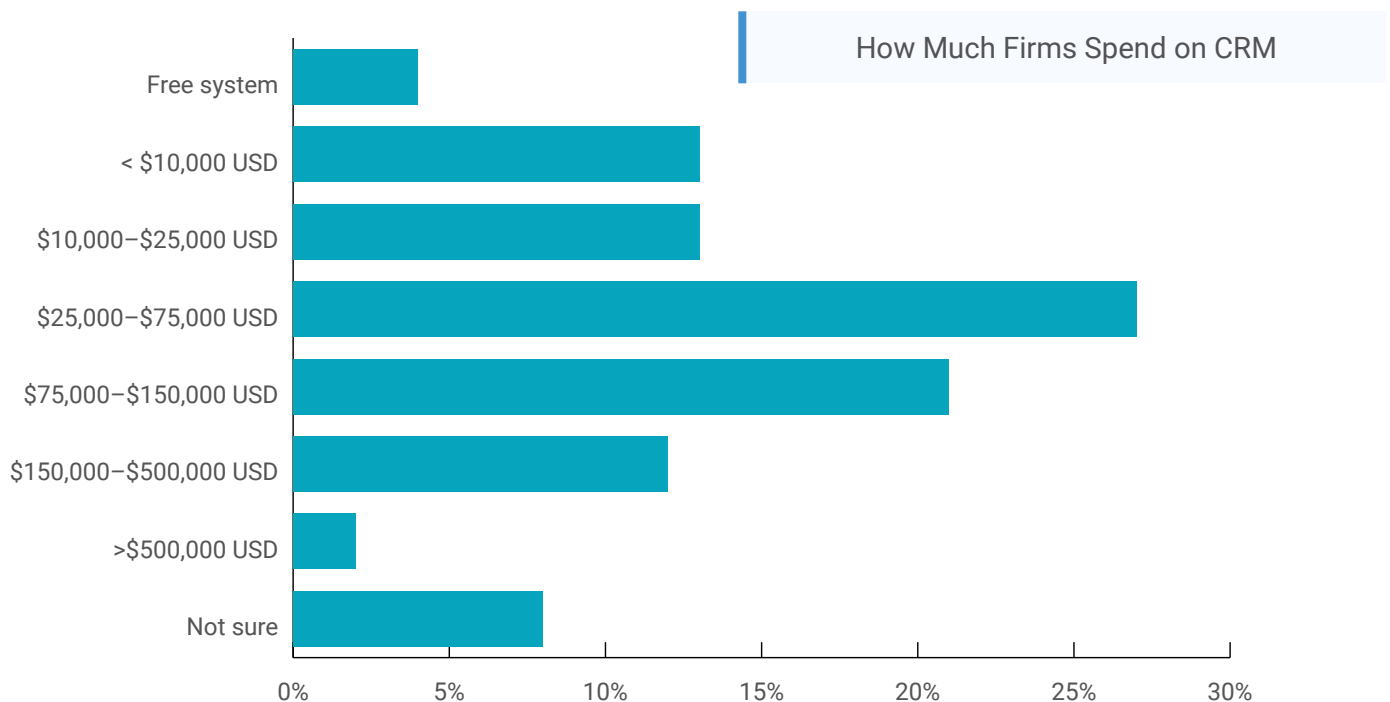
Consulting firms – HubSpot, Microsoft Dynamics 365, Pipedrive

Engineering firms – Microsoft Dynamics 365, Salesforce, Zendesk

Nearly one out of 10 (9%) engineering firm developed its own CRM platform.

How Much Professional Services Firms Spend on CRM

When asked how much their firms spend on CRM in a typical year, more than a quarter of marketing/ BD professionals (27%) report that their firms spend between $25,000 and $75,000 USD, and the second highest percentage (21%) spend between $75,000 and $150,000.

How Much Firms Spend on CRM

Category	Percentage
Free system	4%
< $10,000 USD	13%
$10,000–$25,000 USD	13%
$25,000–$75,000 USD	27%
$75,000–$150,000 USD	21%
$150,000–$500,000 USD	12%
>$500,000 USD	2%
Not sure	8%

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Of fewer than one out of 10 marketing/BD professionals across firm type (8%) who report they aren't sure what their firms spend on CRM, the highest percentage are at law firms (15%), more than twice as many as any other industry.

CRM Spend by Industry

Legend:
- Not sure
- >500,000+ USD
- $150,000–$500,000 USD
- $75,000–$150,000 USD
- $25,000–$75,000 USD
- $10,000–$25,000 USD
- <$10,000 USD
- Free system

Categories: Law firms, Accounting firms, Financial advisory firms, Consulting firms, Engineering firms
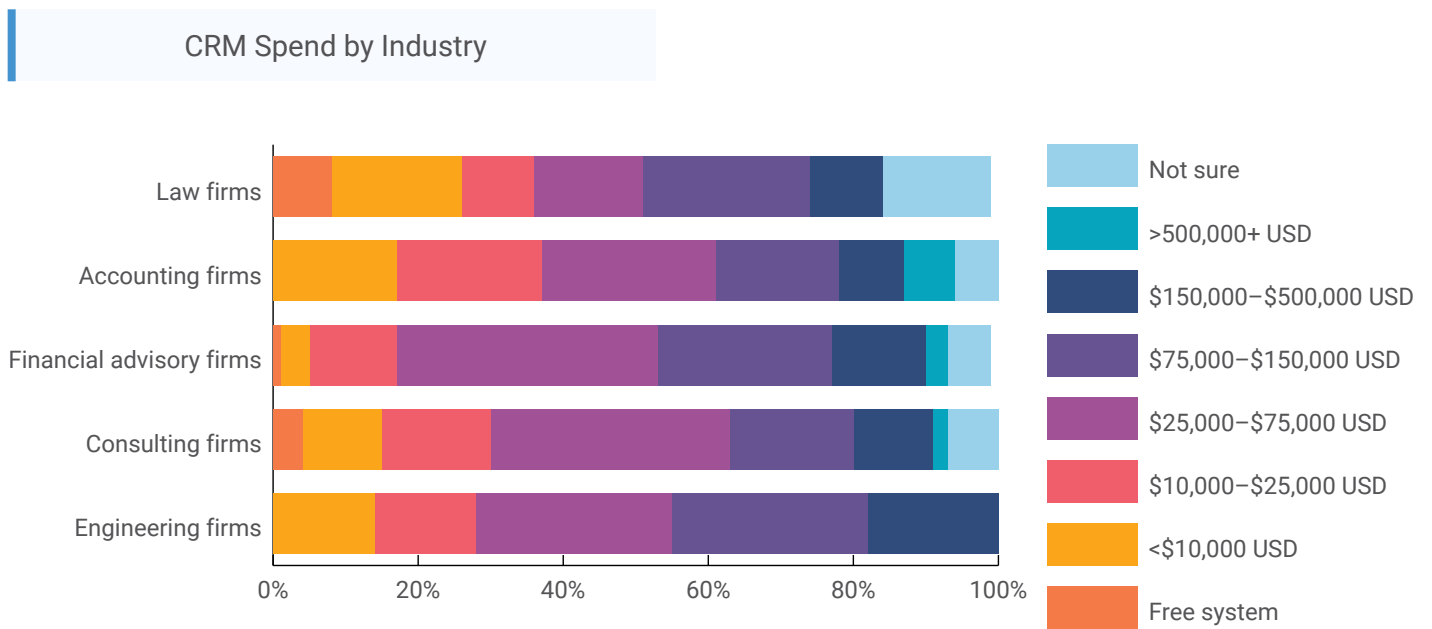
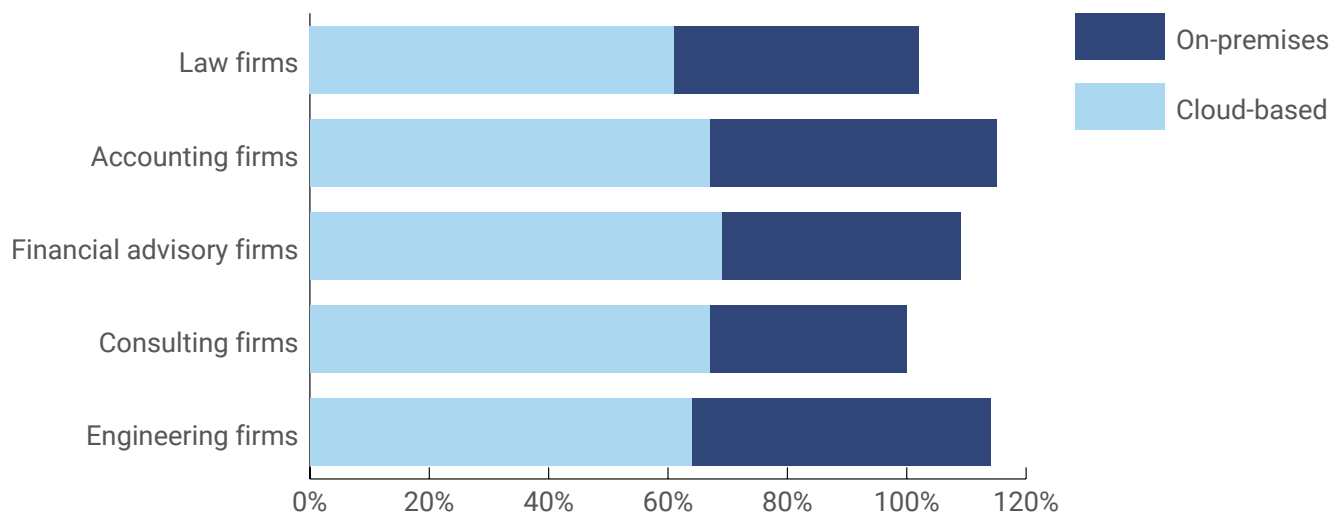# Are CRMs Cloud-based or On-premises at Professional Services Firms

We then asked whether Professional Services firms' CRMs are cloud-based or on-premises. Nearly two-thirds of firms (65%) report using a cloud-based CRM. 41% report they use an on-premises CRM, indicating that 6% use both a cloud-based and on-premises CRM platform.

Legend:
- Cloud-based
- On-premises

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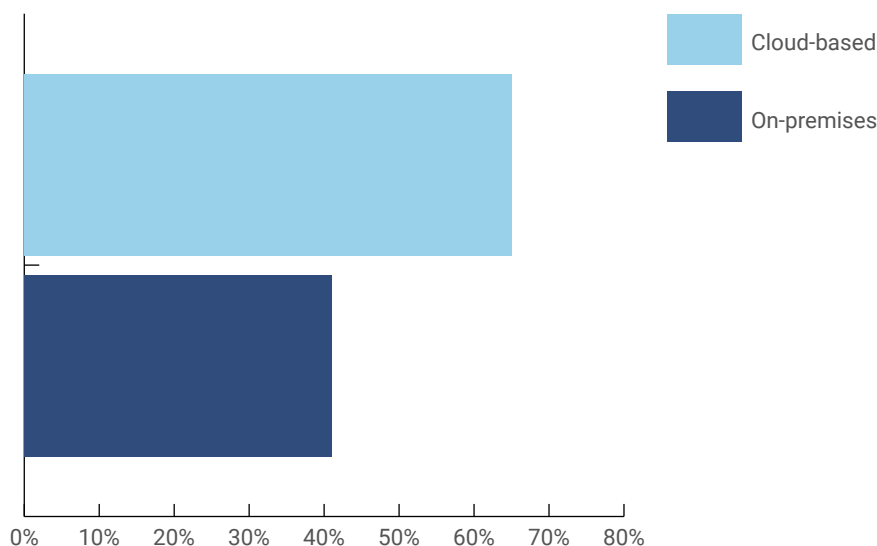
Financial Advisory firms report having the highest percentage of cloud-based solutions (69%), and law firms the lowest percentage (61%).

Half of engineering firms have an on-premises solution, the highest percentage across firms, and consulting firms report having the fewest (33%).

Cloud-based vs. On-premises by Industry

Legend:
- On-premises
- Cloud-based

Categories (top to bottom): Law firms, Accounting firms, Financial advisory firms, Consulting firms, Engineering firms

X-axis: 0%, 20%, 40%, 60%, 80%, 100%, 120%

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The Effectiveness of CRM for Key Marketing/ BD Functions

We then asked respondents to rate the effectiveness of their CRM solution on a scale of 1-5 (1 being very ineffective and 5 being highly effective) for each of 10 essential marketing/BD functions.

On average, fewer than one out of five (19%) Professional Services firms rate CRM highly effective across functions. Nearly a third of firms (30%) rate their CRM at four out of five across functions and just slightly fewer (26%) rate their CRM at three/moderately effective.

CRM Effectiveness for Marketing/BD Functions
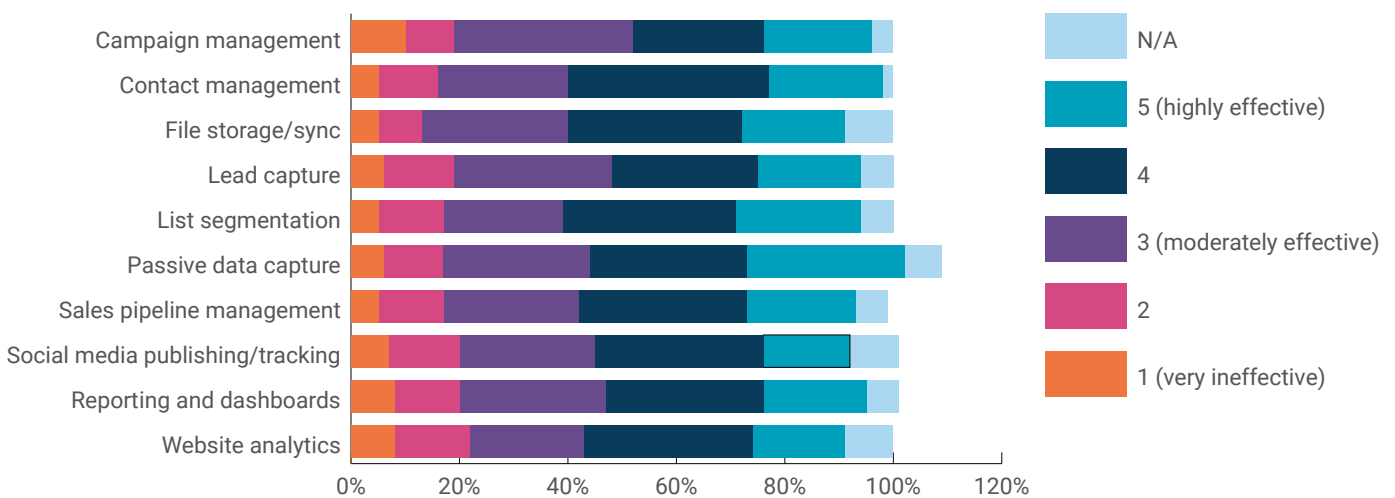
Looking at firms by type, the highest percentage of engineering firms finds CRM to be effective across every marketing/BD function except file storage. Of all firms, law firms find their CRM to be the least effective in six out of 10 functions. In the data below, most effective represents total 4 and 5 ratings, and least effective represents 1 and 2 ratings.

Campaign Management

Most effective – Engineering firms (54%)

Least effective – Financial advisory firms (22%)

Contact Management

Most effective – Engineering firms (77%)

Least effective – Financial advisory firms (25%)

File Storage

Most effective – Law firms (27%)

Least effective – Engineering firms (77%)

Lead Capture

Most ineffective – Engineering Firms(64%)

Least effective – Law firms (30%)

List Segmentation

Most effective – Engineering firms (63%)

Least effective – Law firms (23%)

Passive Data Capture

Most effective - Engineering firm (64%)

Least effective –Law firms (29%)

Sales Pipeline Management

Most effective–Engineering firms (72%)

Least effective – Law firms (30%)

Social Media Publishing/Tracking

Most effective – Engineering firms (77%)
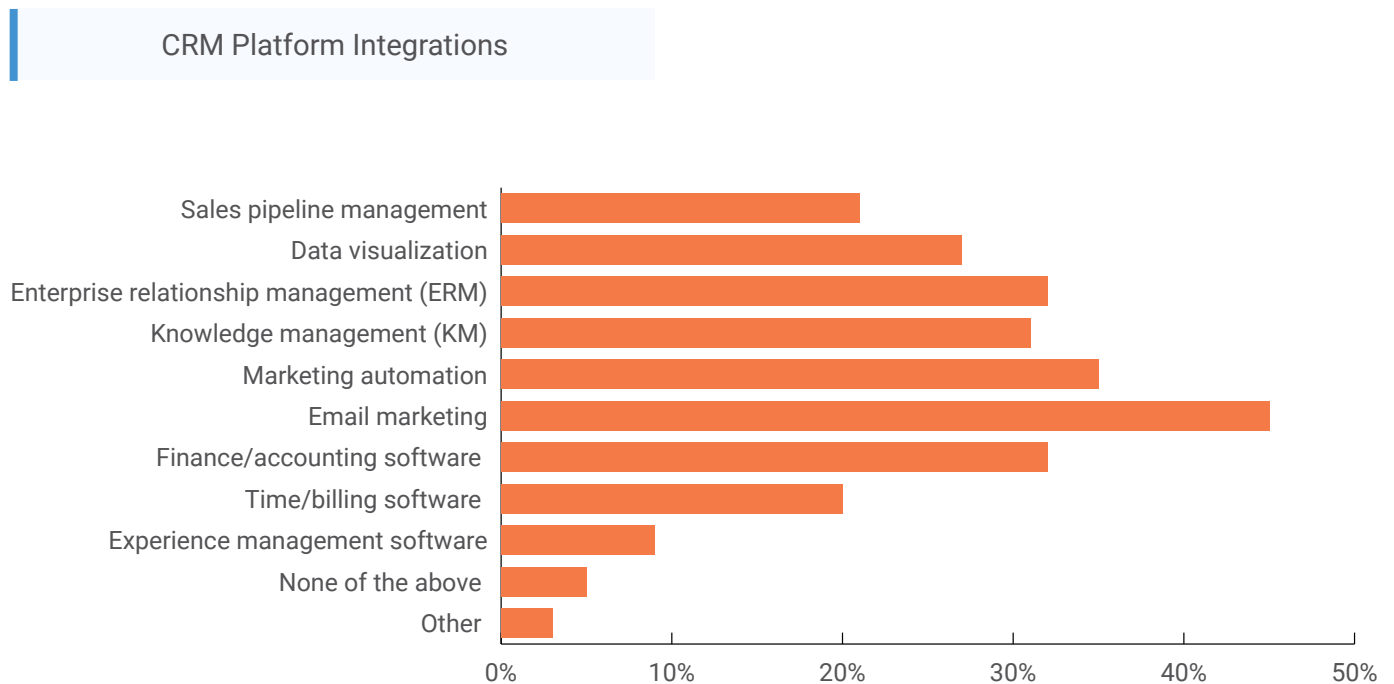
Least effective – Law firms (30%)

Reporting and Dashboards

Most effective – Engineering firms (73%)

Least effective – Law firms (39%)
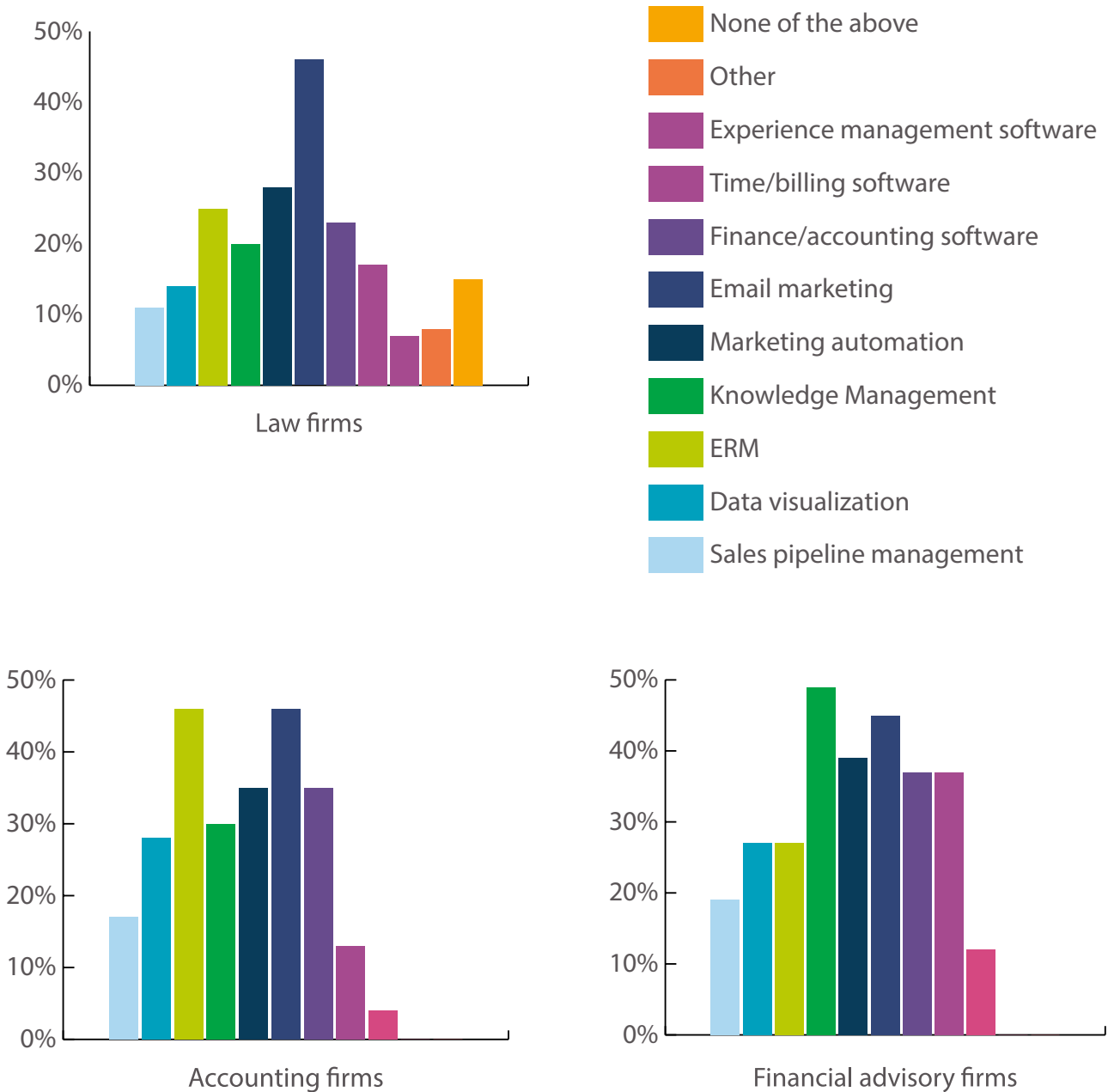
CRM Platform Integrations

Of nine types of CRM software integrations, the highest percentage of Professional Services firms (45%) integrate their email marketing with their CRM platforms. The next most popular integrations are with marketing automation (35%), followed by a tie between Enterprise Relationship Management (ERM) and finance/accounting software (both 32%).

Of the nine types of integrations, the fewest Professional Services firms integrate their CRMs with experience management software (9%).

CRM Platform Integrations

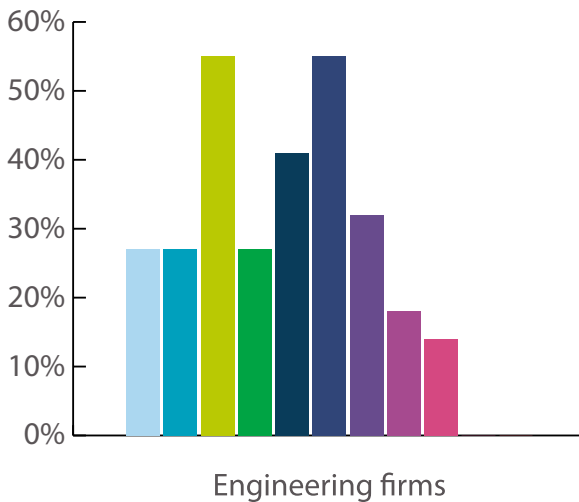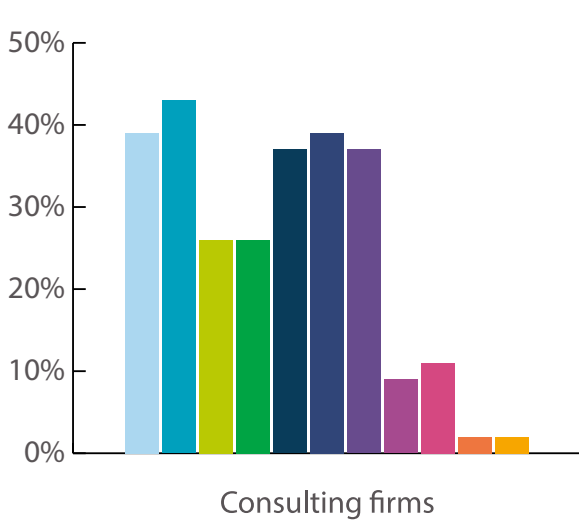| Category	Percentage
Sales pipeline management	21%
Data visualization	27%
Enterprise relationship management (ERM)	32%
Knowledge management (KM)	31%
Marketing automation	35%
Email marketing	45%
Finance/accounting software	32%
Time/billing software	20%
Experience management software	9%
None of the above	5%
Other	3%

Across Professional Services firm types, the greatest percentage of engineering firms integrate email marketing with their CRM (55%). Engineering firms also report the greatest number of marketing automation integrations (41%) and ERM integrations (55%).

CRM Platform Integrations by Industry

Legend:
- None of the above
- Other
- Experience management software
- Time/billing software
- Finance/accounting software
- Email marketing
- Marketing automation
- Knowledge Management
- ERM
- Data visualization
- Sales pipeline management

Law firms

Accounting firms

Financial advisory firms

CRM Platform Integrations by Industry

Consulting firms

Engineering firms

Legend:
- None of the above
- Other
- Experience management software
- Time/billing software
- Finance/accounting software
- Email marketing
- Marketing automation
- Knowledge Management
- ERM
- Data visualization
- Sales pipeline management

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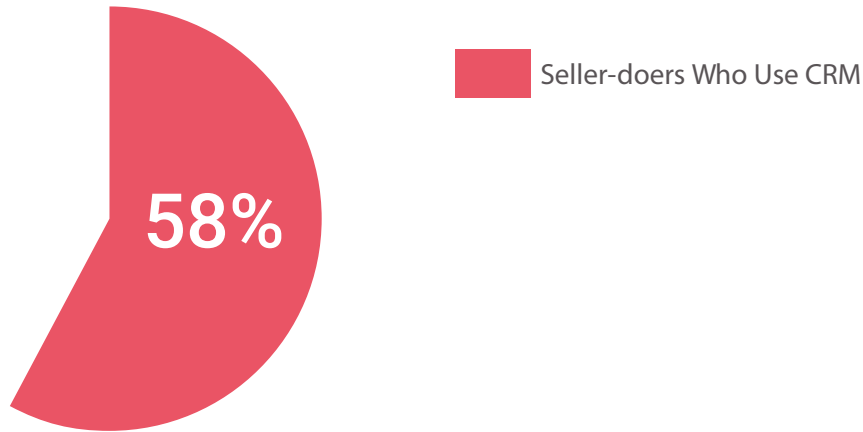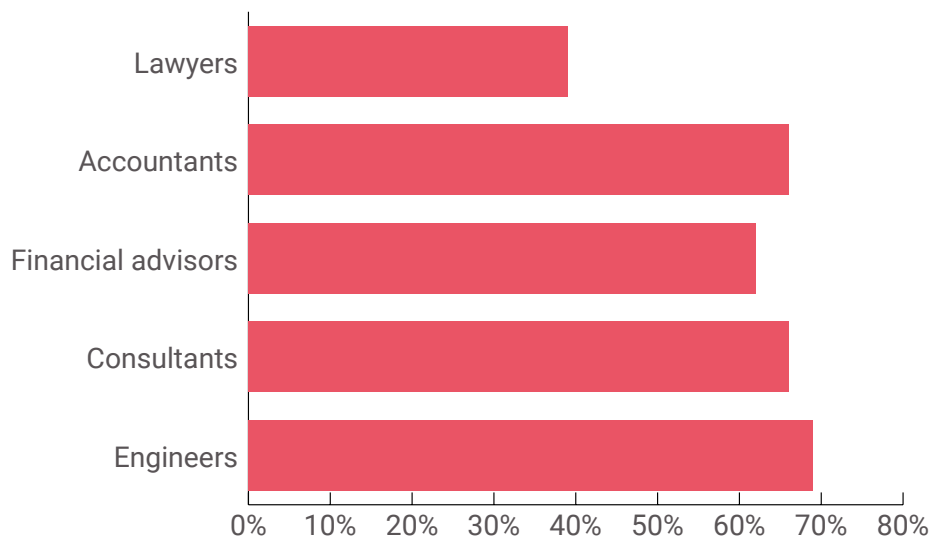
How Many Professional Services Seller-Doers Use CRM

We asked respondents what percentage of seller-doers use CRM in their firms, even if only to look up contact information. On average, across firm types, 58% of seller-doers use CRM for at least one of its functions. This is up slightly from last year's survey, where firms reported that 53% of seller-doers used their firm's CRM.

58%

■ Seller-doers Who Use CRM

Comparing firm types, engineering firms have the highest percentage of seller-doers who are CRM users (69%), and law firms have the lowest (39%).

Seller-doer CRM Users by Industry

Bar chart: Lawyers ~39%, Accountants ~66%, Financial advisors ~62%, Consultants ~66%, Engineers ~69%. X-axis: 0% to 80%.
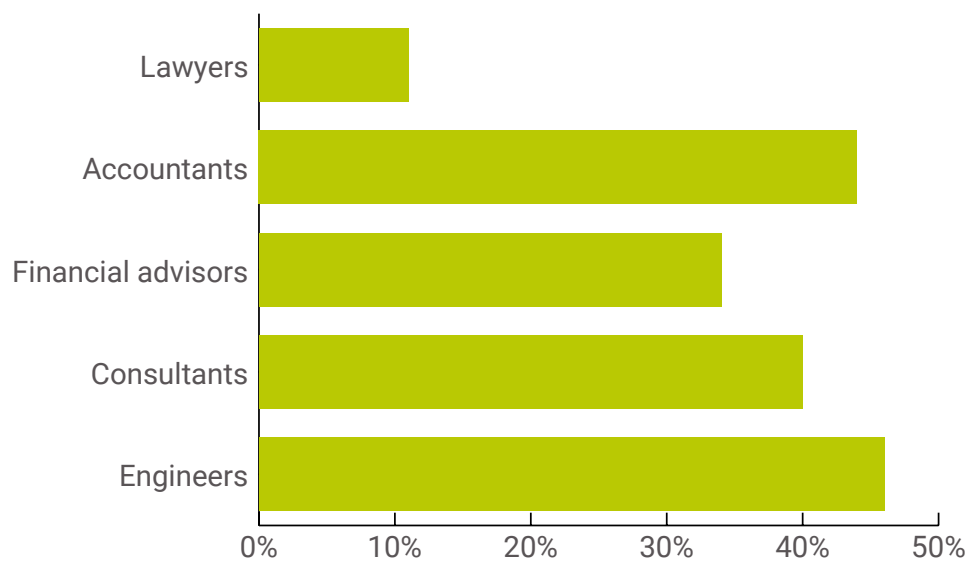
How Many Professional Services Seller-Doers Use CRM for Sales Pipeline Management

Next, the survey asked, of the seller-doers who use CRM at their firm what percentage use it regularly for sales pipeline management - defined as at least once every two weeks. According to respondents, an average of 50% of seller-doers who use CRM use it regularly for pipeline management.

Once again, comparing firm types, engineers represent the highest percentage of seller-doers using CRM regularly for business development (46%), and lawyers the lowest (11%).

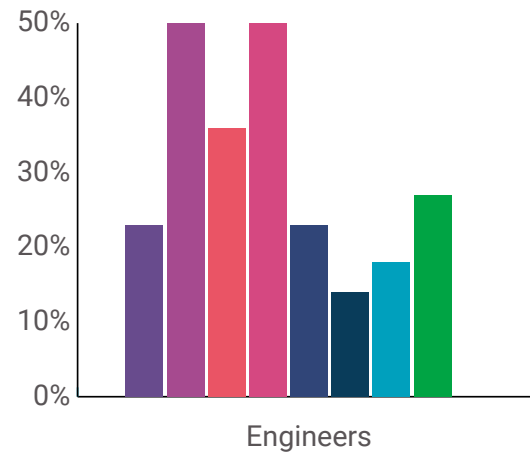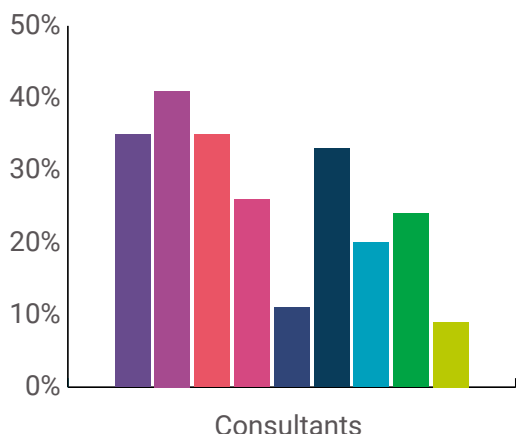Seller-doers Who Use CRM Regularly for Pipeline Managment by Industry
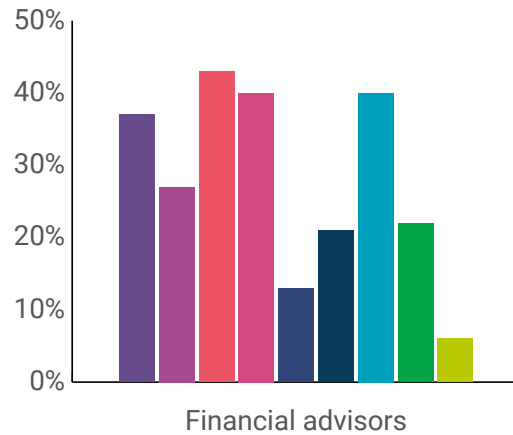

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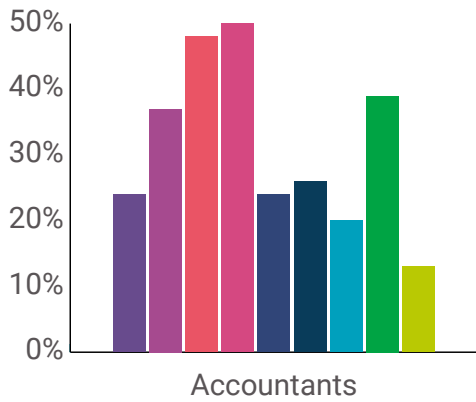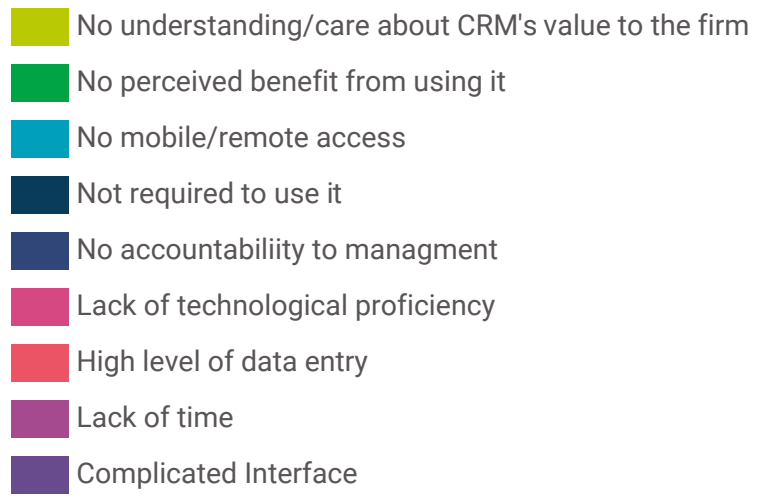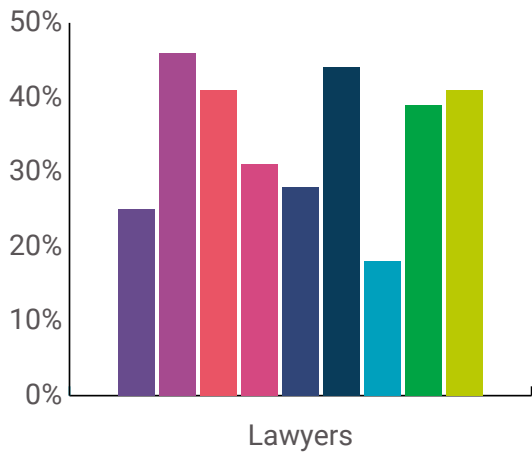
CRM Adoption Challenges

Given that seller-doers build their businesses through their relationships with clients and referral sources, why do so few of them use CRM to manage their relationship pipelines? We asked Professionals Services firm marketers and BD professionals to rank their top three contributors to low adoption.

Across firm types, the high level of data entry required, seller-doers' lack of time, and seller-doers' lack of technical proficiency are the leading contributors to low CRM adoption for sales pipeline management (41%, 39% and 38%, respectively). In last year's survey, high level of data entry and lack of time were also the top two contributing factors.

CRM Adoption Challenges
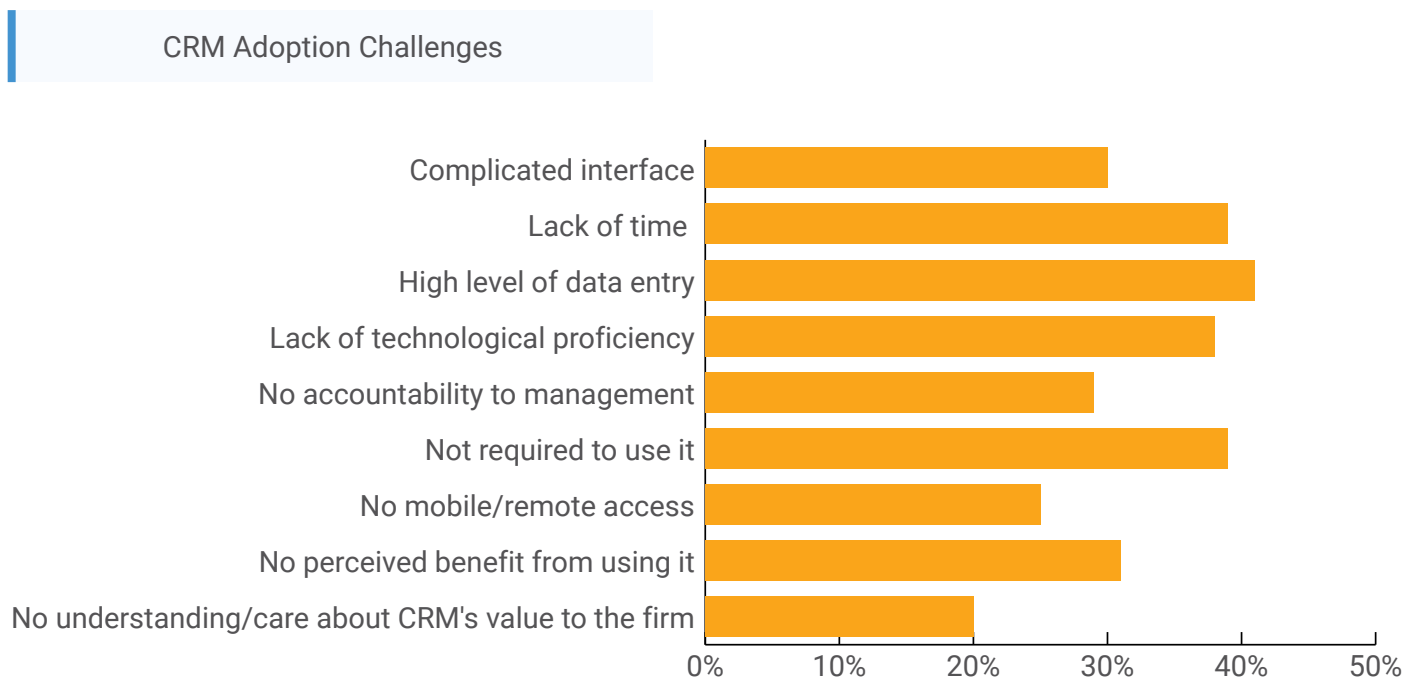
Comparing the top three contributors to low CRM adoption for business development by firm type shows that lack of time and the high level of data entry CRM requires are common top contributors for all.

CRM Adoption Challenges by Industry

Legend:
- No understanding/care about CRM's value to the firm
- No perceived benefit from using it
- No mobile/remote access
- Not required to use it
- No accountabiliity to managment
- Lack of technological proficiency
- High level of data entry
- Lack of time
- Complicated Interface

Lawyers

Accountants

Financial advisors

Consultants

Engineers

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What Seller-Doers Who Don't Use CRM for Sales Pipeline Management Use Instead

Now we know some of the top challenges that explain why many seller-doers who use CRM don't use it regularly for sales pipeline management. Next, we asked what they use instead.

Marketing/BD professionals report that more than half of seller-doers (52%) use Word documents, 40% use Excel spreadsheets, and 33% use paper notes. In last year's survey, marketing and BD professionals reported that 63% of seller-doers used Word documents, 57% used spreadsheets and 29% use paper notes.

What Seller-doers Use Instead for Pipeline Management
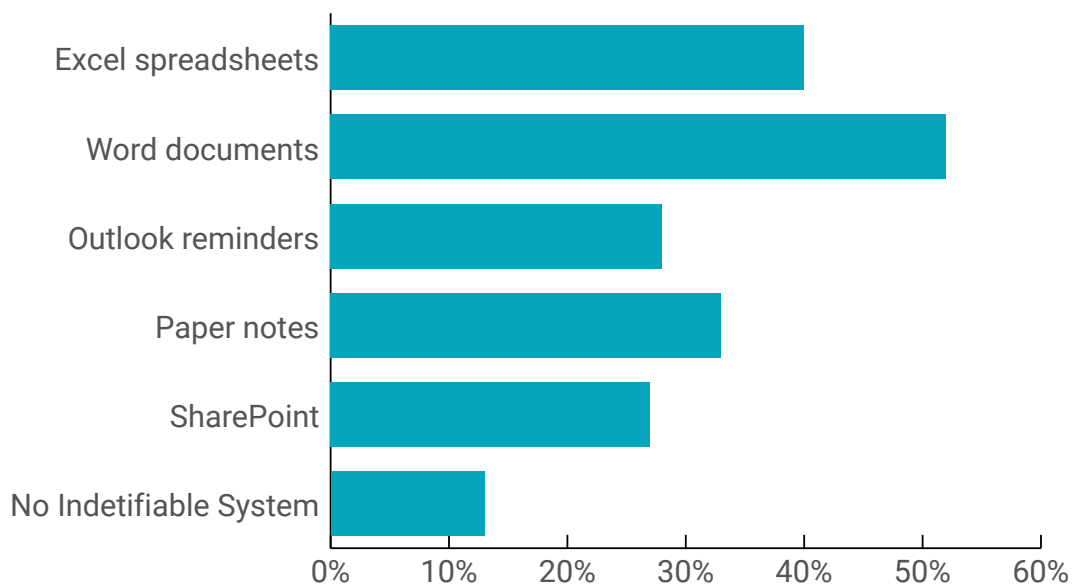
Less popular, but still utilized methods of sales pipeline management include Outlook reminders (28%), SharePoint (27%), and 13% use no identifiable system.

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Comparing firms, nearly a third of lawyers (31%) are using an unidentifiable system for sales pipeline management, and two-thirds of financial advisors and nearly as many engineers (64% and 63%, respectively) use Word documents to track BD activities.

What Seller-doers Use for Pipeline Managment Instead

Legend:
- No Indetifiable System
- SharePoint
- Paper notes
- Outlook reminders
- Word documents
- Excel spreadsheets
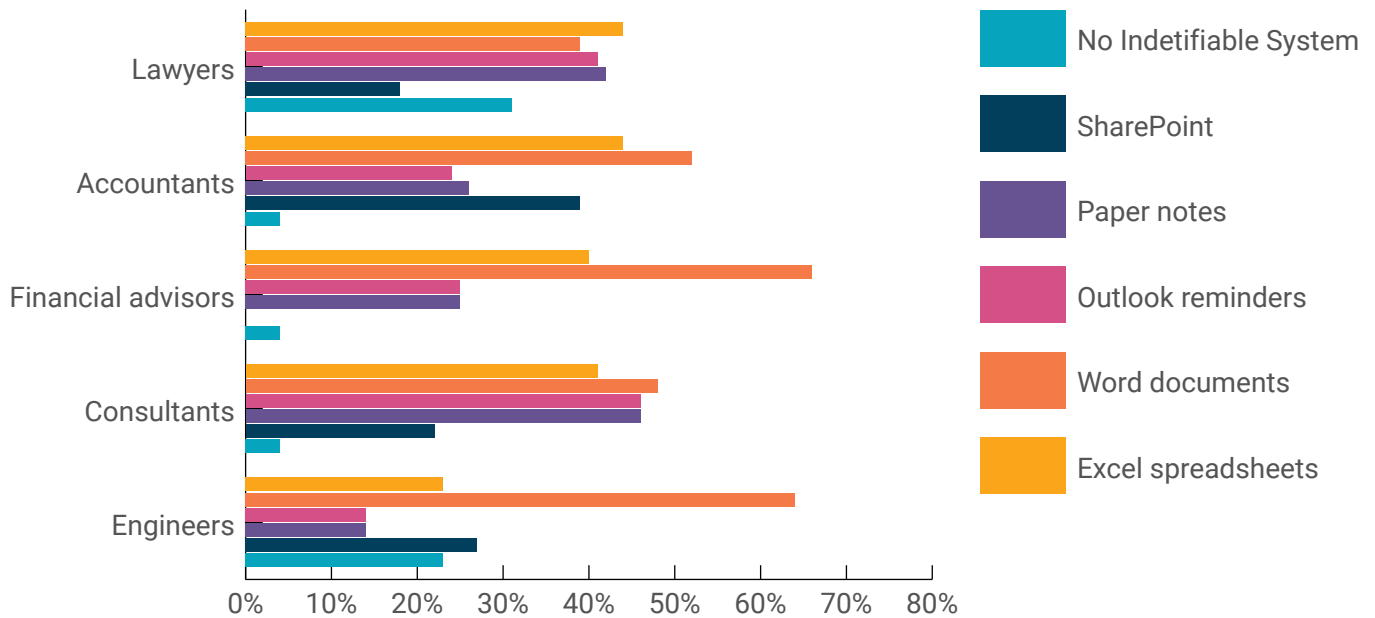
Seller-doer Accountability for Using CRM

Lack of accountability to management for regularly using CRM for sales pipeline management was one of the factors we asked about in the earlier question about seller-doers' CRM adoption challenges. The responses to that question show that, across firm types, lack of accountability to management was considered a top three concern at just 20% of firms.

In the next question, we dig a little deeper into the topic by asking marketing/BD professionals what level of accountability seller-doers at their firms are held to for using CRM regularly for sales pipeline management. Respondents share that seller-doers at the majority of Professional Services firms face very little accountability (36%) and they face no accountability at 29% of firms. While the percentages aren't identical this is consistent with findings in previous surveys.

Accountability Seller-doers Face for Using CRM

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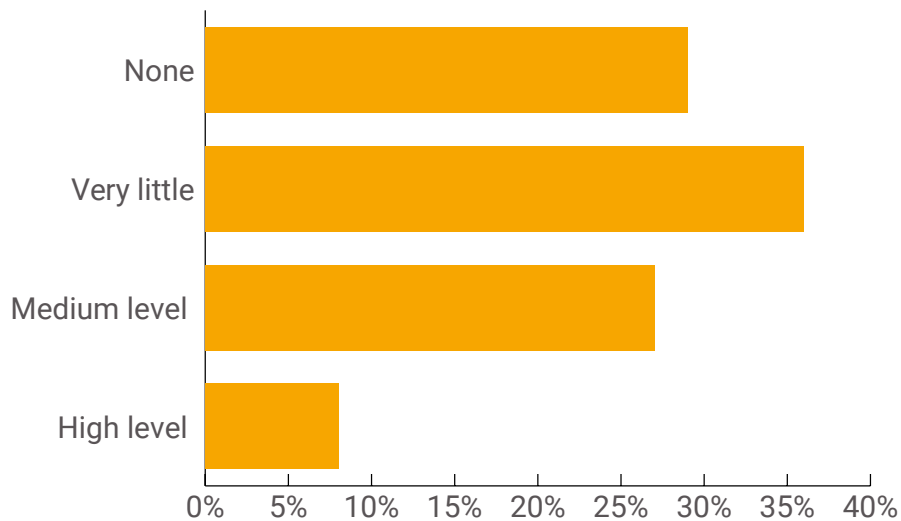
Comparing types of firms, the highest percentage of financial advisors are held to a high level of accountability for using CRM regularly for sales pipeline management (18%), and the highest percentage of lawyers (56%) face no accountability at their firms. Last year's survey revealed that lawyers were held to little or no accountability at half of firms.

## Accountability Seller-doers Face for Using CRM by Industry
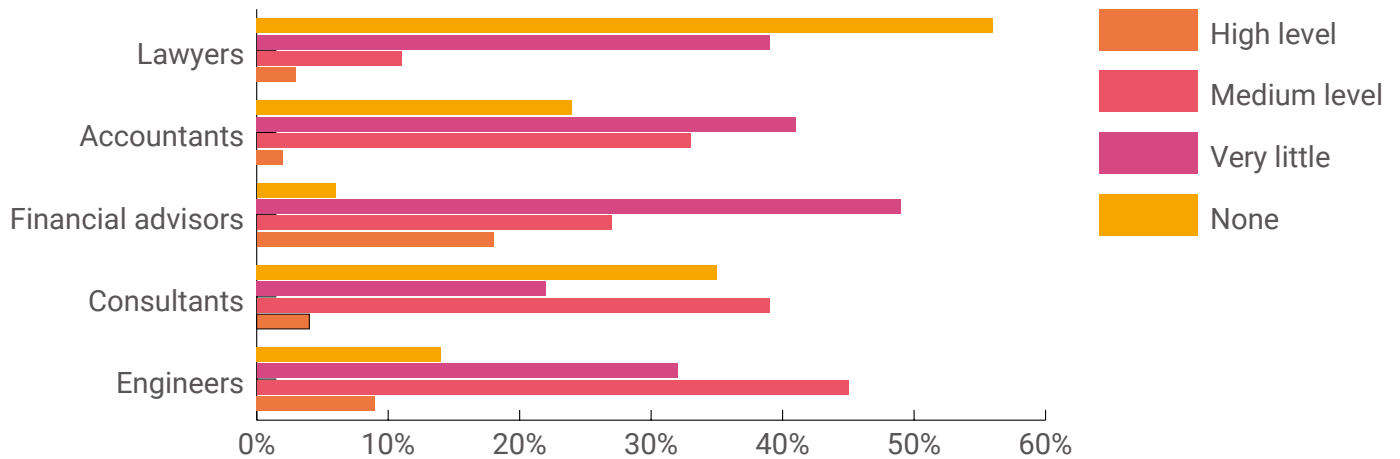
What Professional Services Firms Use to Support CRM Implementation

Adoption of new technology of any type can be challenging and the support – or lack thereof – provided would-be users can make or break adoption success. We asked marketing/BD professionals what their firms use to support CRM implementation and who provides each service.

On average, across firm types, support services and providers, the highest percentage of firms (36%) use initial training/onboarding services by their CRM provider, and the second highest (25%) use ongoing training by their CRM provider. In last year's survey, the highest percentage of respondents (33%) also reported using their CRM provider for initial training/onboarding.

What and Who Firms Use to Support CRM Implementation
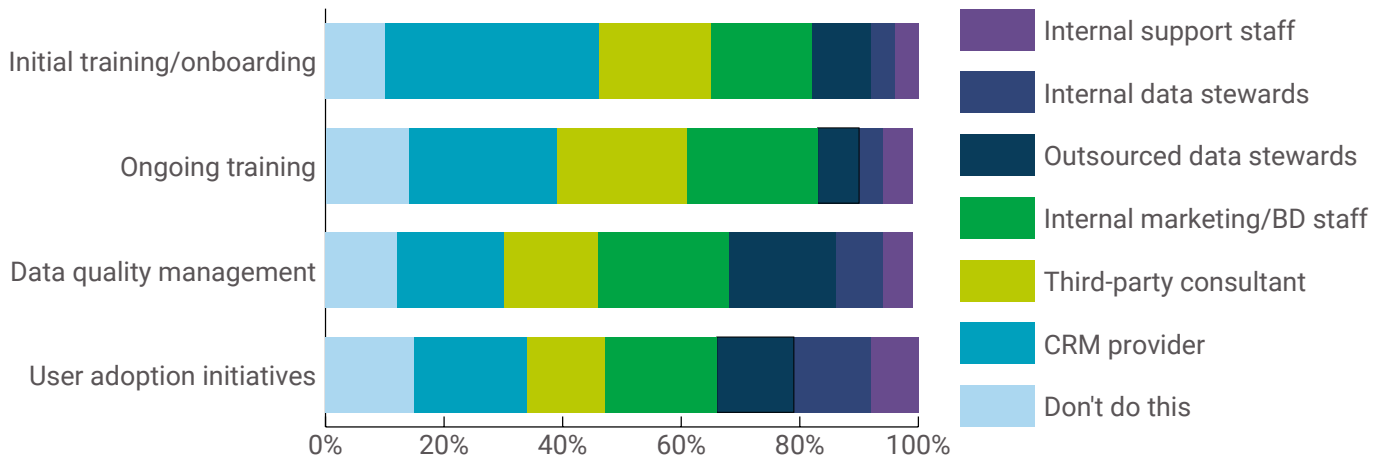
The same percentage of firms (22%) used third-party consultants as use internal marketing/BD staff for ongoing CRM training. And across industries, as many firms rely on marketing/BD teams for user adoption initiatives as those who use their CRM provider (19%). Similarly, in last year's survey, 20% of firms relied on marketing and business development for user adoption initiatives and 19% used their CRM provider.

The highest percentage of firms that rely on internal marketing/BD staff for CRM implementation are financial advisory for initial training/onboarding (24%), engineering firms for ongoing training (32%), engineering for data quality management (32%), and law firms for user adoption initiatives (27%).

Tools and Initiatives Professional Services Firms Use to Increase CRM Adoption

In addition to providing support services when CRM solutions are implemented, firms have additional resources at their disposal to help maximize user adoption. We asked marketing/BD professionals what tools and initiatives they use at their Professional Services firms to increase CRM adoption.

Across firm type, the highest percentage of firms (41%) use marketing and/BD teams to update their CRM on behalf of seller-doers. The number two CRM user adoption tool or initiative Professional Services firms use is BD coaching by external coaches (30%).

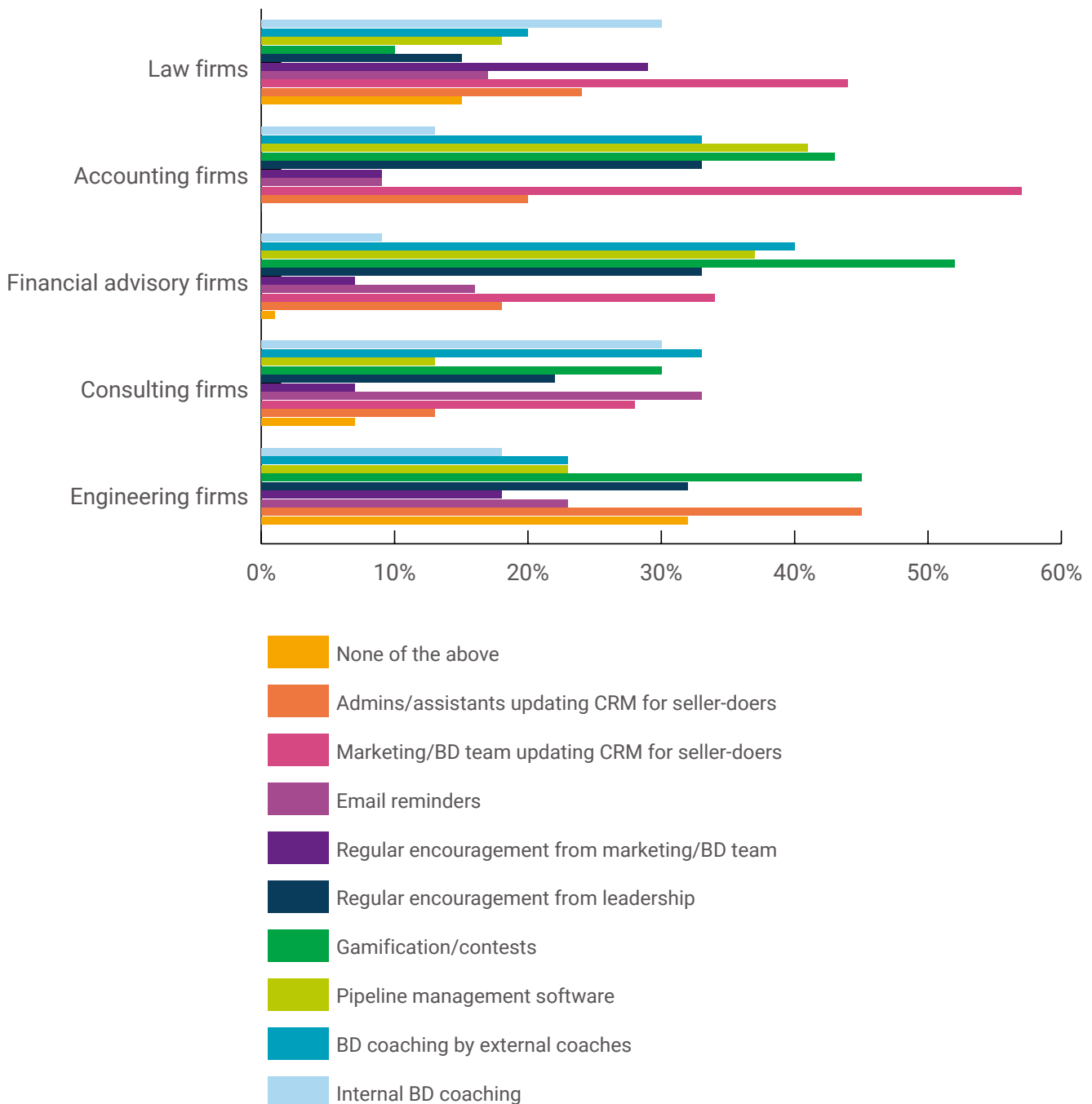## Seller-doer CRM Adoption Tools and Initiatives
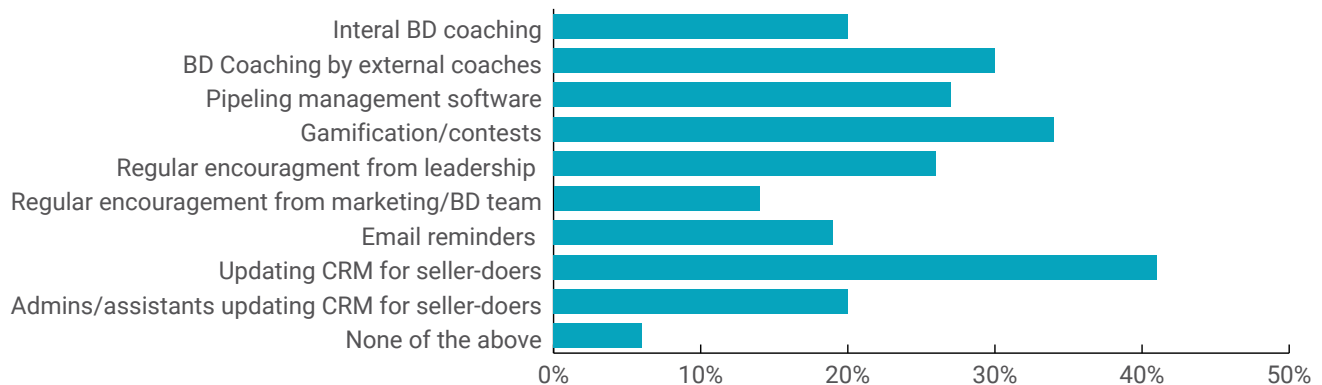
In our last survey, respondents reported that 54% of firms used business development coaching provided by external coaches.

The CRM user adoption tool or initiative the smallest percentage of firms use is regular encouragement from the marketing/BD team (14%).

Comparing Professional Services by firm type, one of the top three CRM adoption initiatives in every type of firm across industries includes marketing/BD teams or assistants updating CRM on behalf of seller-doers.

Gamification/contests for seller-doers to increase CRM adoption is a top three initiative at financial advisory, engineering, accounting, and consulting firms but is only used by 10% of law firms.

CRM Adoption Tools and Initiatives by Industry

Legend:
- None of the above
- Admins/assistants updating CRM for seller-doers
- Marketing/BD team updating CRM for seller-doers
- Email reminders
- Regular encouragement from marketing/BD team
- Regular encouragement from leadership
- Gamification/contests
- Pipeline management software
- BD coaching by external coaches
- Internal BD coaching

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Quantifiable ROI CRM Delivers

Having in-depth responses about how effective CRM is for several marketing//BD functions, how many seller-doers use it, how many of them use it regularly for business development, as well as the CRM implementation and adoption services, tools, and initiatives marketing/BD professionals use, we asked about the level of quantifiable ROI CRM delivers for their firms.

Quantifiable ROI CRM Delivers


- 4 (high)
- 3 (medium)
- 2 (little)
- 1 (none)
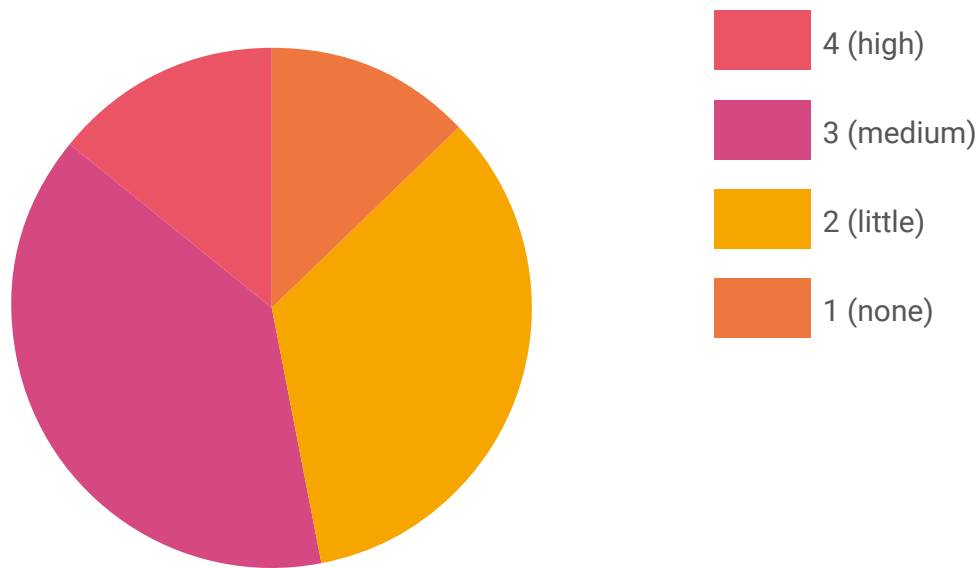
Overall, marketing/BD professionals at Professional Services firms report that CRM delivers little (34%) or a medium level (39%) of ROI. Very few report it delivers either no (13%) or a high level (14%) of ROI. In last year's survey, 14% of firms also reported they received high ROI.

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Comparing firm types, the largest percentage of law firms (66%) report their CRM provides little to no ROI. In last year's survey, just 18% reported the same. Fifty-four percent of accounting firms, 37% of financial advisory firms, 33% of consulting firms and 28% of engineering firms report receiving little to no ROI.

Conversely, the largest percentage of engineering firms (18%) report their CRM provides a high level of ROI, followed by accounting firms (17%). Last year's report showed that the highest percentage of accounting firms reporting high ROI was a tie between accounting and consulting (both 28%).

Fifteen percent of financial advisory firms and 11% of both law firms and consulting firms report their CRMs deliver a high level of quantifiable ROI.

ROI CRM Delivers by Industry
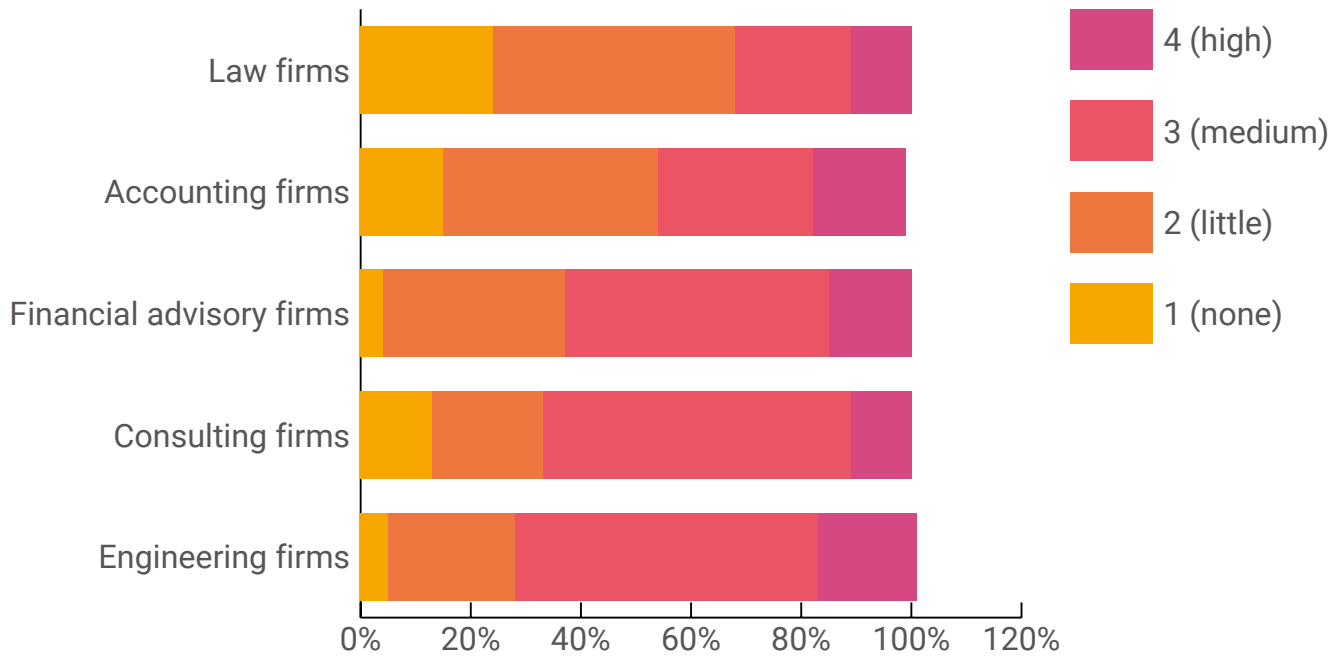
Professional Services Firms' Biggest Business Development Challenges

Finally, we asked marketing/BD professionals at Professional Services firms to select their biggest business development challenges.

According to responses, the biggest BD challenge overall is seller-doers not prioritizing BD enough (20%), followed closely by seller-doers lacking the coaching to make them effective and hold them accountable (19%).

The third most cited BD challenge is that firms lack a strong BD culture (14%).

Firms' Biggest BD Challenges

The least cited BD challenge is a tie between not having enough proactive attention paid to key clients and an ineffective culture for cross-selling (both 4%). Having an ineffective culture for cross-selling was only cited by 4% of firms in last year's survey, as well.

Firms that cited seller-doers not prioritizing business enough to be their firms' biggest BD challenge are engineering and law firms (27% and 24%, respectively), followed by consulting and financial advisory firms (20 and 19%, respectively). In last year's survey more than half of financial advisory firms reported that business developers don't prioritize business development enough.

Significantly fewer accounting firms (13%) identify seller-doers not prioritizing business enough as a number one challenge.

Seller-doers' lack of coaching to make them effective and hold them accountable is cited most by engineers (27%) and accounting and financial advisory firms (26% and 25%, respectively). The challenge, which is a top challenge at Professional Services firms overall, is cited at considerably fewer law and consulting firms (14% and 9%, respectively).

The responses by firm type for the BD challenge of ineffective systems/culture for cross-selling, while the least cited challenge overall, are notable. Nearly one in 10 law firms cite it (9%), while considerably fewer financial advisory and consulting firms do (4% and 2%, respectively), and no accounting or engineering firms cite it.

Firms' Biggest BD Challenges by Industry
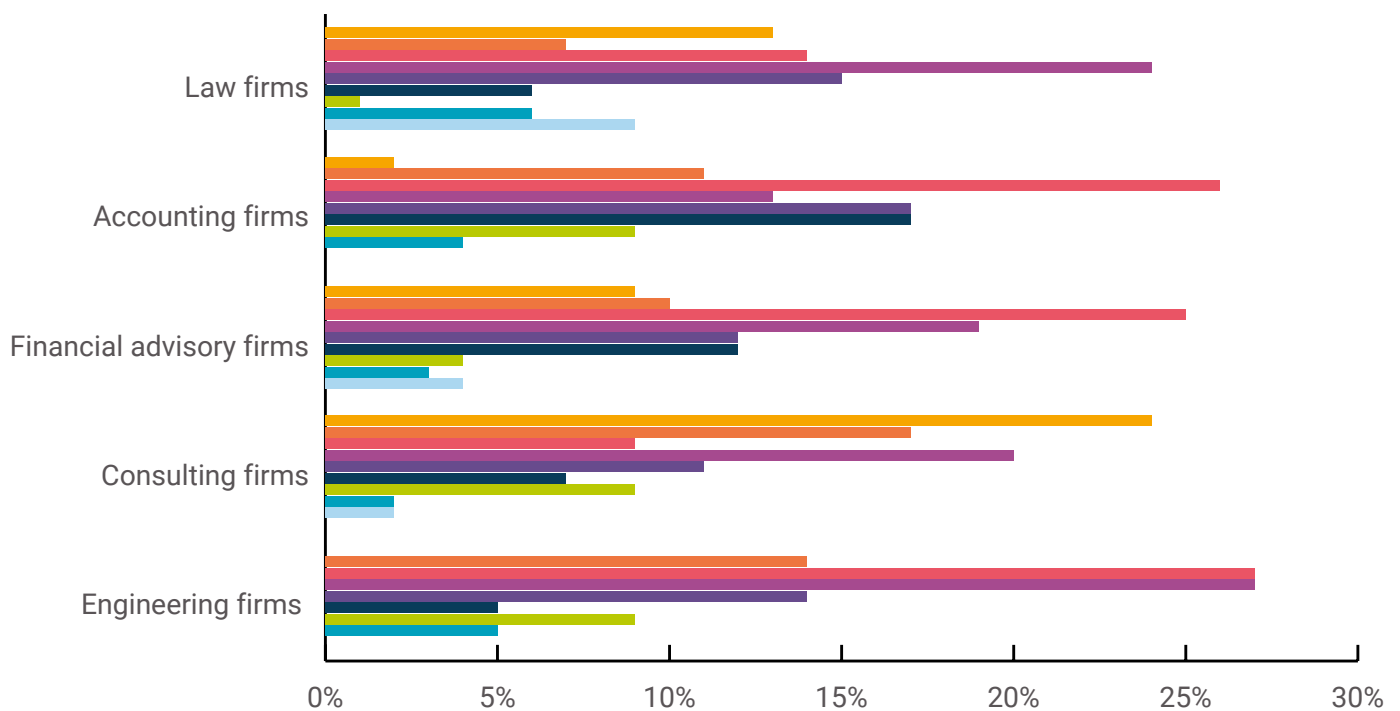
Legend:
- Ineffective systems/culture for cross-selling
- Not enough proactive attention to key clients
- BD champions don't have enough influence
- No leadership buy-in for BD
- Lack of a strong BD culture
- Seller-doers don't prioritiize BD enough
- Seller-doers lack coaching to make them effective and hold them accountable
- Seller-doers lack the technology to be effective
- Seller-doers lack techniques/knowledge to be effective

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Conclusion

2023 brings many of the same challenges that Professional Services firms faced in 2022, like ever-changing hybrid work arrangements and talent shortages. Added to the mix are three exacerbating factors: a decrease in demand driven by an uncertain economic forecast, the ever-increasing array of technologies vying for market share, and a dose of decision-maker skepticism based on technology investments that have not yet demonstrated ROI. In the wake of these challenges, Professional Services firms must find ways to motivate busy, client-focused seller-doers to consistently and effectively manage their sales pipelines. In the 2023 State of CRM industry report, we explore the perspective of marketing/BD professionals as they seek to navigate these business development headwinds.

Our research shows that nine out of 10 Professional Services firms – whether law, accounting, financial advisory, consulting or engineering – have a CRM solution, two-thirds of which are cloud-based. Some have both a cloud-based and on-premises solution. (Multiple platform environments are more and more common considering the high number of firm mergers over the past few years.) But having the platform and benefitting from it are two very different things. This year's survey reveals that little more than a quarter find their CRM to be only moderately effective across ten critical marketing/BD functions.

Of course, for CRM to be even remotely effective, it needs to be consistently utilized by seller-doers to manage their pipelines. When asked about seller-doers CRM adoption, three key challenges are cited:

1. The high level of data entry required
2. Seller-doers' lack of time
3. Seller-doer's lack of technical proficiency

Looking at challenges by Professional Services firm type, it's notable that a significant percentage of professionals from law and consulting firms cite seller-doers not being required to use CRM as a factor contributing to low adoption.

Professionals at accounting and engineering firms cite that their seller-doers do not perceive any value in using CRM, and a significant percentage of professionals at financial advisory, accounting, and engineering firms cite that their CRM interface is too complicated to be user-friendly.

Another adoption challenge is the lack of integration across technology platforms, as illustrated by a comment from a law firm marketing/ BD professional in this year's survey, "We are seven years in with our CRM with little to no integration support. We'll likely be searching for a more integrated tool in the near future that will hopefully address our issues."

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To win more business from their relationships, seller-doers must follow best practices, which include implementing sustainable business development systems, prioritizing relationship targets, tracking BD activities, and analyzing results. Ideally, seller-doers would use tools specifically developed for such functions, like CRM. But our research shows that roughly half of seller-doers don't use CRM at all, and when it comes to sales pipeline management, over 50% are still using Word, about four out of 10 are using Excel spreadsheets, and a third are using paper notes. These old-school methods demonstrate that the Professional Services sector is significantly lacking in sales efficacy and missing out on growth opportunities.

In our more than 20 years of experience working with Professional Services firms, we've found that business development accountability is critical for success. Our survey asked firms to identify the level to which they hold seller-doers accountable for using CRM. Marketing/BD professionals claim that seller-doers are held to little or no accountability at nearly two-thirds of firms. Firm leadership is very likely underestimating the effectiveness of putting accountability measures in place to improve seller-doer CRM user adoption.

But accountability does not necessarily have to be driven by leadership. It is notable that across firm types, marketing/BD professionals are emerging as leading providers of data quality management and user adoption at Professional Services firms. According to our respondents, the two highest rated initiatives used to increase seller-doer CRM adoption are:

1. Marketing/BD professional updating their CRM on behalf of seller-doers
2. BD coaching by external coaches

The seller-doers who work closely with their marketing/BD teams to maintain their sales pipelines in CRM are much more likely to benefit from a sales process. Those who hire external coaches to act as personal trainers are more likely to improve the health of their business pursuits.

Despite the low percentage of seller-doers who use CRM for sales pipeline management at Professional Services firms and the adoption challenges CRM presents, we wanted to know what level of ROI marketing/BD professionals report from their CRM investments.

Overall, marketing/BD professionals at Professional Services firms at nearly three out of four firms report that CRM delivers little or a medium level of ROI. Law firms report the lowest return from their CRM, with two-thirds sharing that their CRM provides little to no ROI. More than half of accounting firms report the same. Conversely, of all firm types, the largest percentage of engineering firms – nearly one in five - report their CRM provides a high level of ROI. It is important to remember that, like any technology, CRM

only benefits its user to the extent it is being used. Purchasing a license, then underutilizing it, yields a low return, just as using it strategically yields a payoff.

Finally, we asked marketing/BD professionals at Professional Services firms to identify their biggest BD challenge. According to responses, the biggest BD challenge overall is a tie between seller-doers lacking coaching to make them effective and hold them accountable and seller-doers not prioritizing BD enough. The second most cited challenge is also a tie, this time between seller-doers' lack of techniques or knowledge to be effective at BD and seller-doers lacking the technology to be effective.

The results of the 2023 survey paint a clear picture for firm leaders looking to optimize BD success in a year where client demand is trending down. First, message the importance of business development across your firm, so that more of your seller-doers prioritize it. Second, recognize that your marketing/BD professionals can play a critical enablement role in sales pipeline management. Third, invest in external business development coaches who can guide and hold your high-aptitude candidates accountable to their business development objectives. Finally, measure the ROI of your technology investments, and if you find that the return is shy of expectations, pivot to a more effective alternative.

PipelinePlus Sales Acceleration Software

PipelinePlus addresses the business development challenges facing professional services firms today.

It simplifies business development through a user-friendly interface, showing busy seller-doers which high-value clients, prospects, and referrals to target and what to do with them.

PipelinePlus combines three critical business development features in a single app:

- Pipeline – an intuitive system that helps seller-doers prioritize their most important prospects, clients, and referral sources
- Trainer – a comprehensive library of e-learning tools that cover every step of the business development process
- Insights – concrete BD recommendations that guide seller-doers to the specific actions that will help them close new business

PipelinePlus is available on laptop, desktop or mobile. The stand-alone app only takes five minutes to set up. It can also be used as an integrated CRM companion.

PipelinePlus can be licensed in three tiers based on the needs of your firm.

PipelinePlus Essentials is for up to four individual seller-doers at a firm who want to hone their business development skills and optimize their results.

PipelinePlus Teams is for marketing and business development professionals working with five or more seller-doers at a firm. It includes Pipeline management, Trainer, and BD insights, as well as Viewer, displaying comprehensive dashboards and analytics that track critical data on users' activity and outcomes.

PipelinePlus Coaching pairs seller-doers with a BD expert so they can get the advice, techniques, and accountability necessary to maximize business development outcomes. Used by our top-performing firms, PipelinePlus Coaching offers a powerful combination of coaching that helps seller-doers clarify goals, develop a relationship pipeline, pursue opportunities, and bring in new business, and PipelinePlus sales acceleration software to organize pursuits and track progress.

For case studies demonstrating the ROI firms report from using PipelinePlus, or to schedule a demo, visit www.pipelineplus.com.

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