

2021



**THE 2021 STATE OF CRM IN
PROFESSIONAL SERVICES**

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EXECUTIVE SUMMARY

In September 2021, Ackert Inc. conducted the sixth installment of its market-wide study on Client Relationship Management (CRM) software adoption and utilization in law firms. This year, for the first time, we expanded the scope of the research to include responses from accounting, financial advisory, consulting, and engineering firms. This white paper is a continuation of similar studies conducted since 2015. It examines trends in CRM utilization and, starting this year, represents trends across professional services industries. The 2021 survey collected data from 657 professional services firms.

Key Findings:

More than 9 out of 10 professional services firms have a CRM platform.

Across all industries, seller-doers are CRM users at 11% of firms.

Nearly 40% of professional services firms rate their CRMs as only moderately effective across 12 essential marketing/business development functions.

Only about half of seller-doers who access CRM at firms utilize it regularly for pipeline management.

More than 60% of professional services business developers still use Word documents instead of CRM, and slightly fewer still use Excel spreadsheets.

Professional services marketing/business development leaders lack an understanding of accountability's critical role in ensuring seller-doer CRM adoption.

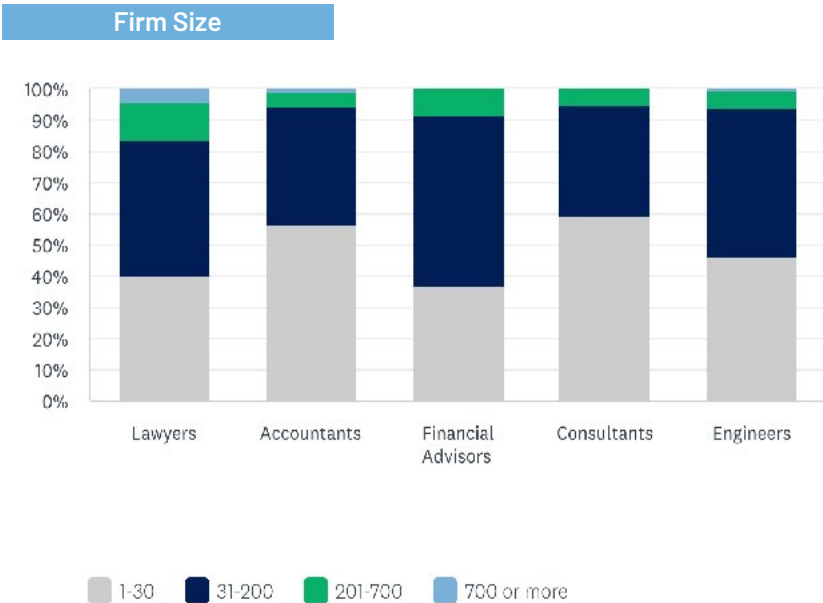
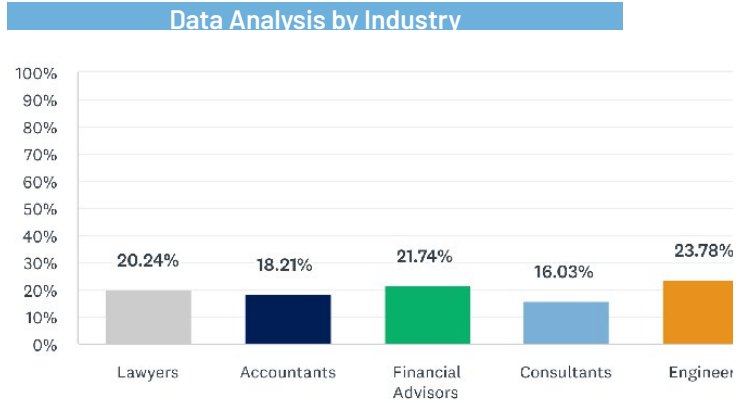
More than 60% of professional service firms report that business developers don't have the technology they need to be effective.

DATA ANALYSIS

Survey respondents represented a relatively even cross-section of professional services industries. The most significant number (24%) of responses came from engineering firms, while the least (16%) came from consulting firms.

We asked the primarily U.S.-based marketing and business development professionals surveyed to answer a series of questions regarding demographics, technology platforms, budget allocations, user adoption, ROI, integration, support services, and business development tracking and accountability initiatives.

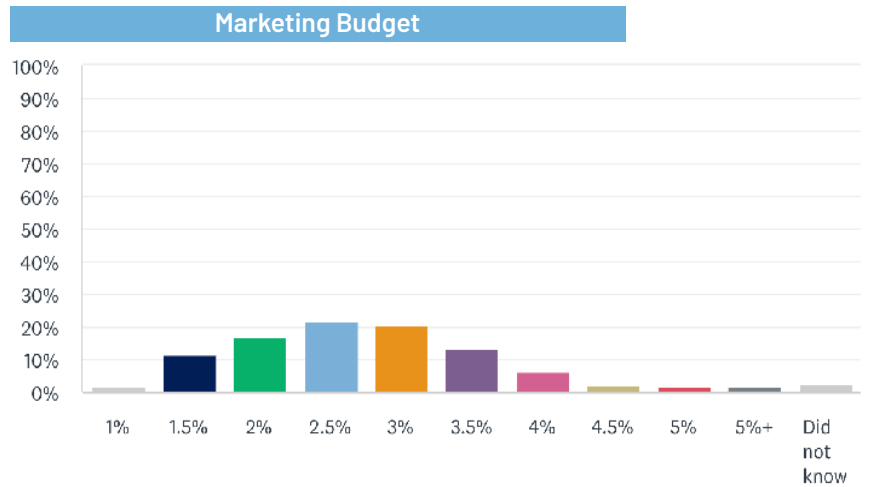
Survey respondents represented firms of all sizes, with a concentration on small and mid-size firms. We asked them to quantify the size of their firms based on the number of seller-doers (lawyers, accountants, financial advisors, consultants, or engineers).



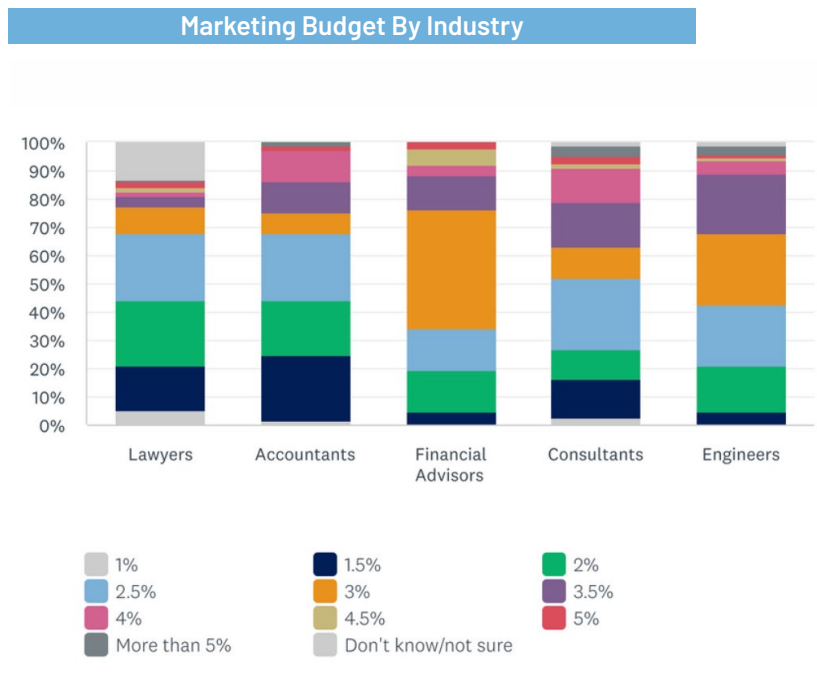
Nearly half (47%) of respondent firms have 1-30 seller-doers, and almost as many (44%) have 31-200. 8% of respondents reported that their firms have between 200-700 seller-doers.

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. Nearly 6 out of 10 (59%) firms have marketing budgets between 2 and 3%.



Comparing marketing budgets across industries, financial advisory firms have the highest percentage in a single budget amount: 42% of respondents from financial advisory firms reported that their marketing budget is 3% of their firms' revenue.



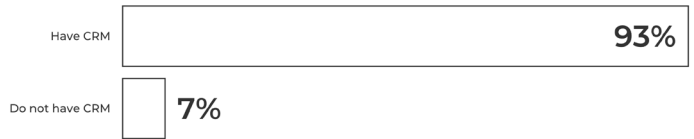
Interestingly, 12% of respondents from law firms indicated they don't know or are not sure what their firm's marketing budget is, compared to just 1% of engineering and consulting firm respondents. No financial advisory or accounting firm respondents reported they don't know or are unsure of their firms' marketing budget.

HOW MANY FIRMS HAVE CRM

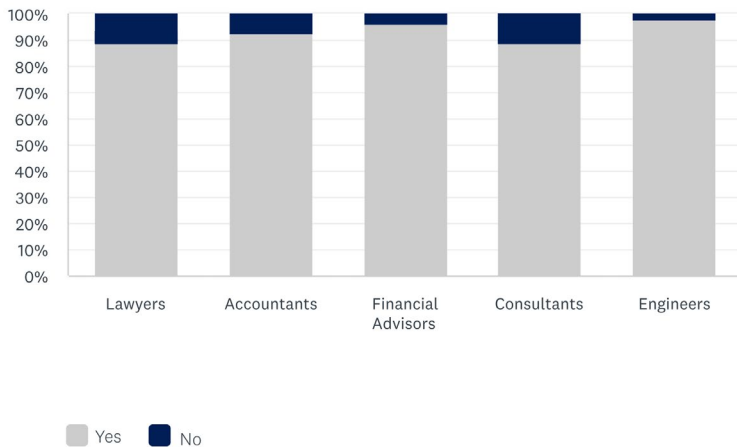
According to respondents, 9 out of 10 (93%) firms have CRM, and 7% do not for the following reasons:

- “Because the company has just started.” (consulting firm)
- “Until I was put in this position in 2018, my firm had never heard of CRM. I have been trying to educate them ever since.” (law firm)
- “No buy-in, limited understanding of usefulness.” (law firm)
- “Concern that lawyers won’t engage (as they don’t on many initiatives).” (law firm)

How Many Firms Have CRM



How Many Firms Have CRM By Industry



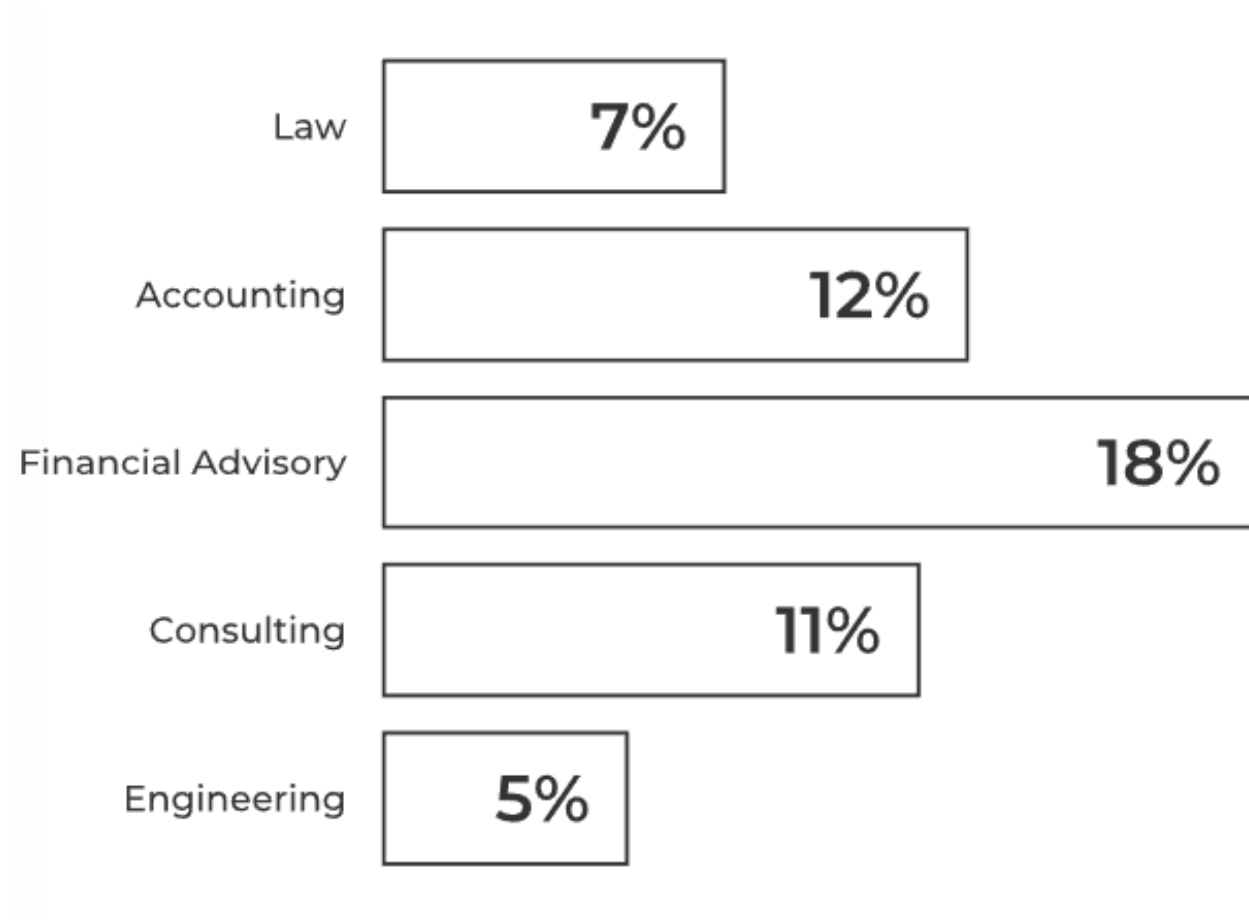
- “No/minimal buy-in; insufficient budget.” (law firm)
- “We are in discussions for possible review and implementation.” (law firm)
- “We are using Hubspot for marketing automation and considering adoption of the CRM capabilities, but have yet to develop or implement a process.” (law firm)
- No buy-in, lack of resources.” (law firm)

Across industries, the highest percentage of engineering firms (98%) report having CRM, and law firms report the lowest percentage (88%).

HOW MANY SELLER-DOERS USE CRM

We asked respondents to select one response indicating the CRM users in their respective firms – lawyers, accountants, financial advisors, consultants, engineers, marketers, or other employees.

How many seller-doers use CRM

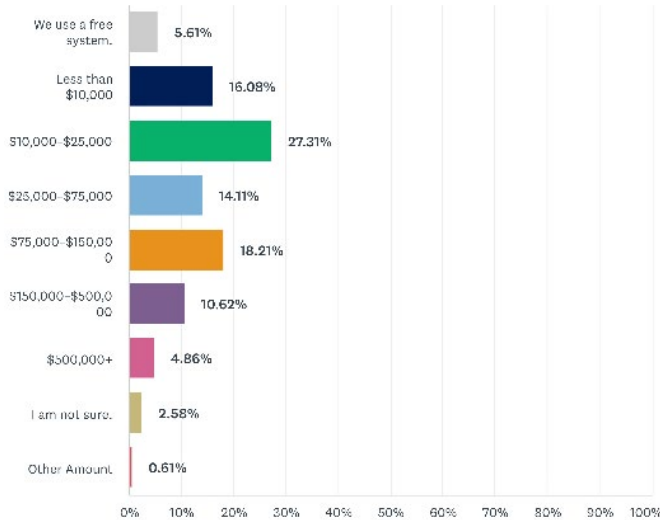


It is important to point out that firms across all industries report that very few of their CRM users are the firms' seller-doers.

HOW MUCH FIRMS SPEND ON CRM IN A TYPICAL YEAR

As a whole, the highest percentage (27%) of professional services firms pay between 10,000 and 25,000 U.S. dollars per year on their CRM platform. On the high end, 5% of firms report that they spend \$500,000 or more. Obviously this statistic comes from larger firms in our survey.

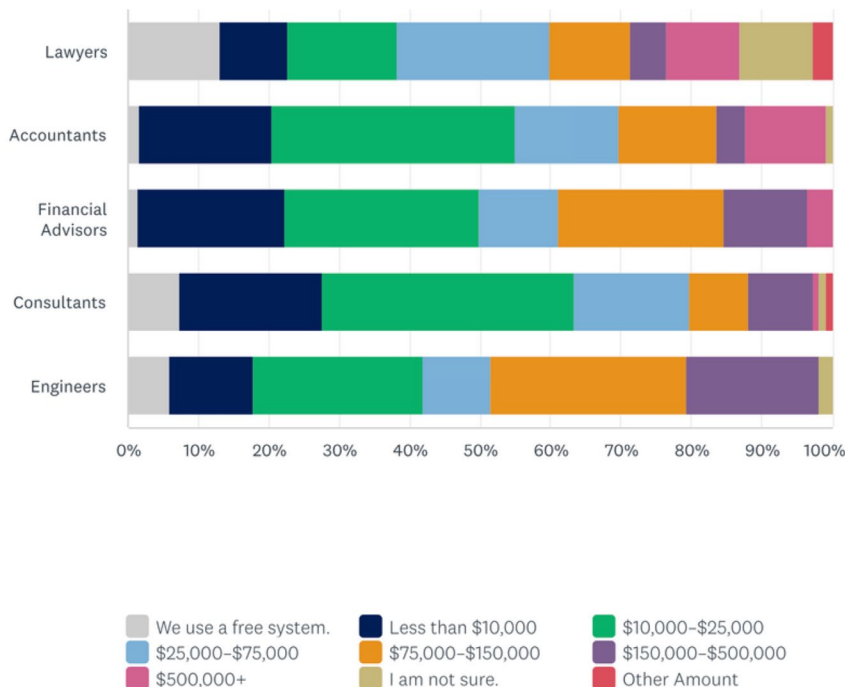
How Much Firms Spend on CRM



Of all the professional services industries surveyed, the highest percentage of accounting firms (11%) spend a half-million dollars or more annually on CRM, followed closely by law firms (10%).

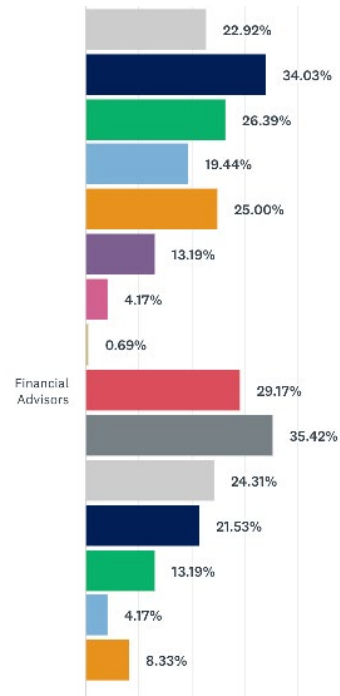
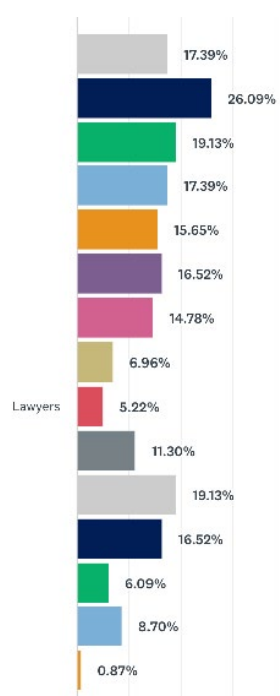
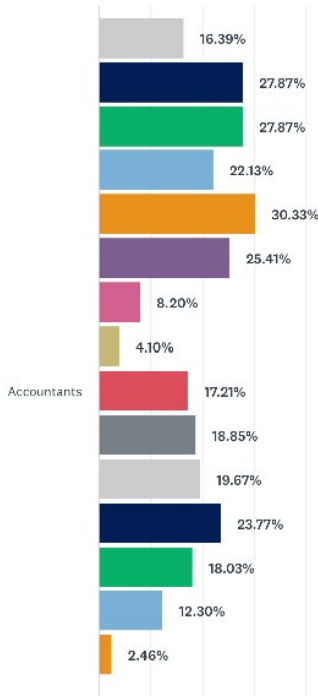
No engineering firms and less than 1% of consulting firms report paying that amount.

How Much Firms Spend on CRM By Industry

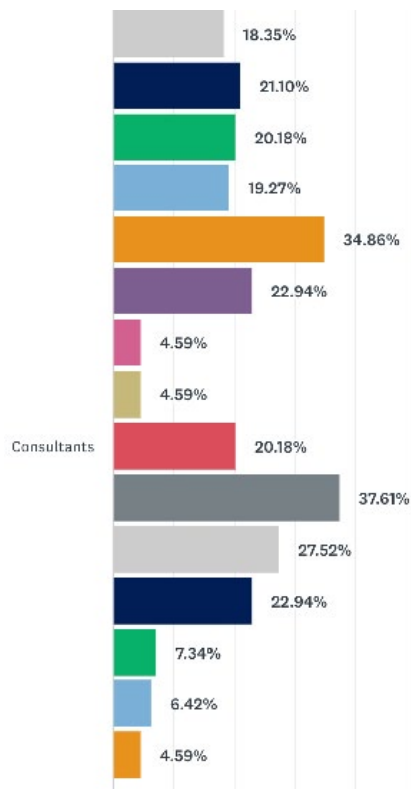
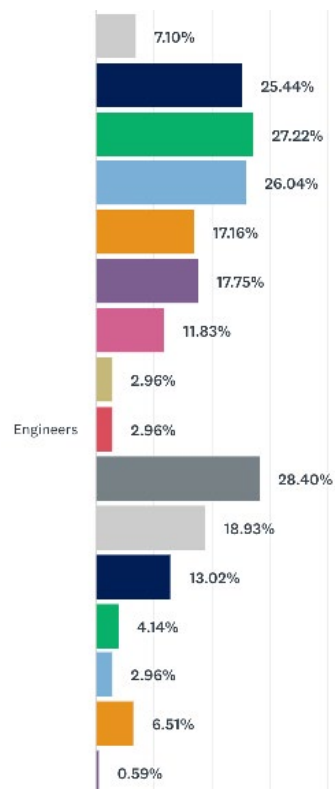


Notably, small law firms, by far, report using the highest percentage (13%) of free CRM systems compared to small firms in other industries. Accounting and financial advisory firms are nearly tie in using the lowest percentage of free CRMs (2% and 1%, respectively).

TYPES OF CRMS AND ADD-ON PLATFORMS



Types of CRM Platforms by Industry



- Thomson 3E BD/BDP
- Cosential
- HubSpot CRM
- InterAction
- Lexicata
- OnePlace (Intapp)
- OnePlace (Salesforce)
- We developed our own platform
- Other (please specify)
- ContactEase
- Deltek
- IntelliPad
- Legal360
- Microsoft Dynamics 365
- Salesforce
- Zoho
- Sugar

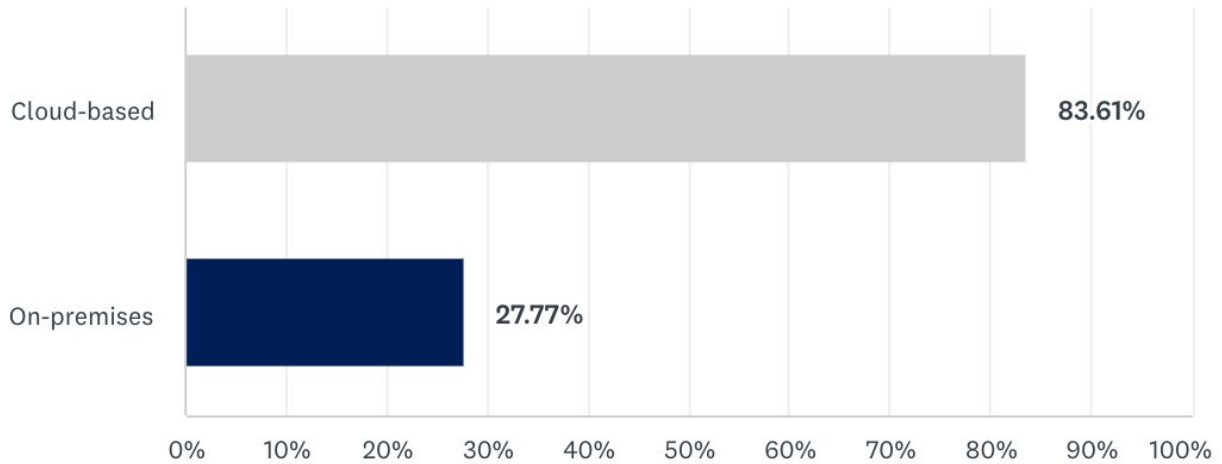
Of 16 types of CRMs and add-ons, the platform used the most by professional services firms is a nearly four-way tie between ContactEase (27%), Microsoft Dynamics 365 (27%), Cosential (25%), and HubSpot CRM (24%). Fewer than 5% of firms report that they developed their own CRM platform.

Note: These results are representative of our respondents, who were mostly small and mid sized firms.

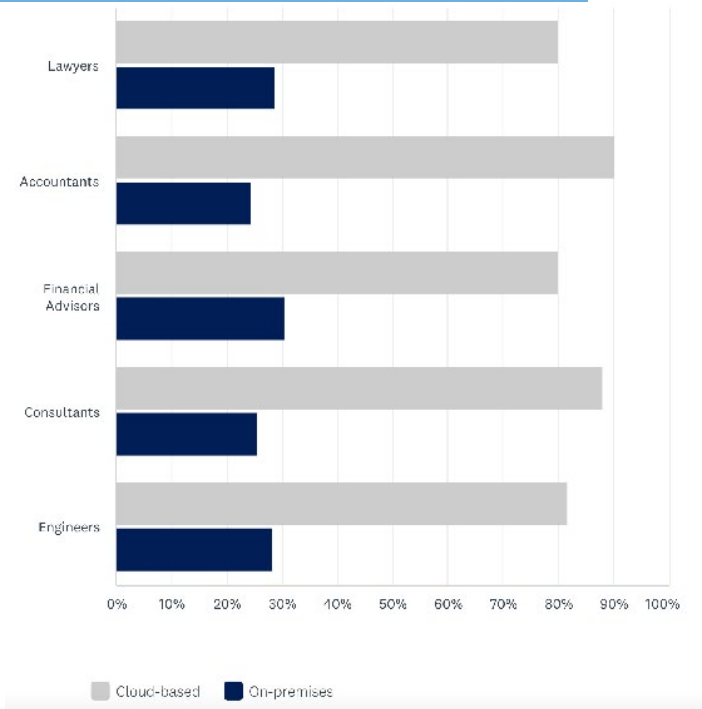
CLOUD-BASED VS. ON-PREMISE CRM SYSTEMS

Across industries, respondents indicate that more than 8 out of 10 (84%) CRMs at professional services firms are cloud-based.

Cloud-Based vs On-Premise CRM



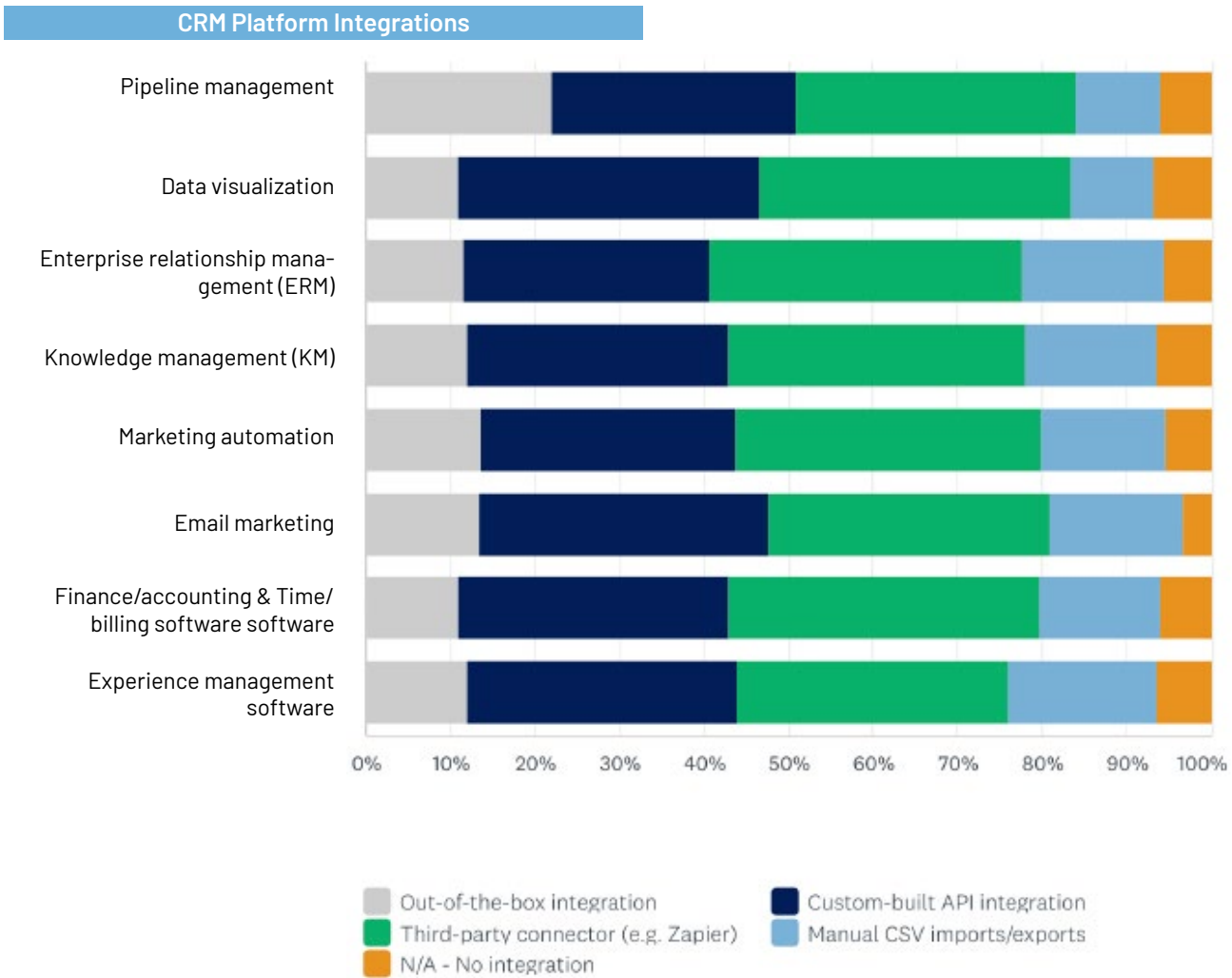
Cloud-Based vs On-Premise CRM By Industry



Comparing by industry, accounting firms report the highest percentage (90%) of cloud-based CRMs, and financial advisory firms report the lowest, but still a significant 80%.

CRM PLATFORM INTEGRATIONS

As a whole, of eight types of software integrations, an average of 95% of respondents report that their professional services firm has one integration in their tech stacks. And of three types of software integrations - out-of-the-box, custom-built API, and third-party connector - firms have the fewest out-of-the-box integrations for all software across the board. Respondents' firms have the lowest percentage of out-of-the-box integrations when it comes to data visualization (11%) and finance/accounting & time/billing software (11%), and the highest number (22%) of pipeline management software.



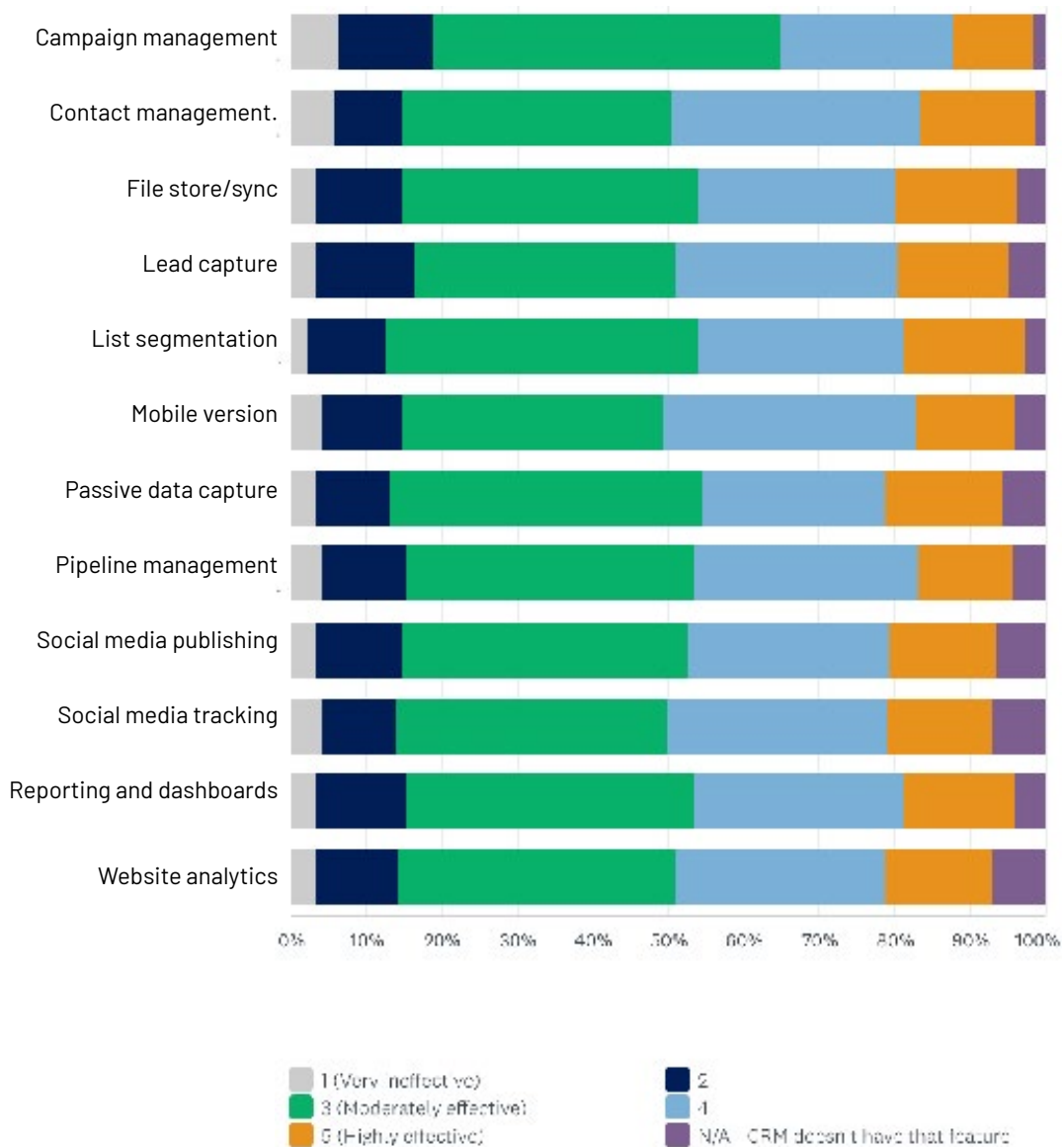
It is interesting to note that, comparing professional services industries, respondents from engineering firms report the highest percentage of out-of-the-box integrations for each of the eight types of software. And, engineering firms also report using the lowest percentage of manual CSV imports and exports for each kind of software, except for experience management software.

Across industries, law firms have a significantly higher percentage of no integrations for each type of software, except for email marketing software.

CRM EFFECTIVENESS

We asked respondents to rate the effectiveness of their CRM tool on a scale of 1-5 (1 being very ineffective and 5 being highly effective) for each of 12 essential marketing/business development functions. Overall, an average of 38% of firms rate their CRMs as only moderately effective across the 12 functions, and about a fourth fewer (28%) rank them a bit higher, between moderately and highly effective.

CRM Effectiveness



Of the 12 marketing/business development functions, it's perhaps not surprising that the functions rated as highly effective by the highest percentage of respondents (approximately 16% for each) are file store/sync, list segmentation, and passive data capture.

The least effective functions in traditional CRMs are pipeline management (12%) and campaign management (11%).

Industry-specific responses reveal some interesting findings. Across all 12 marketing/business development functions, a higher (and often significantly higher) percentage of respondents representing law firms rate their CRMs as highly ineffective than respondents from other professional services industries.

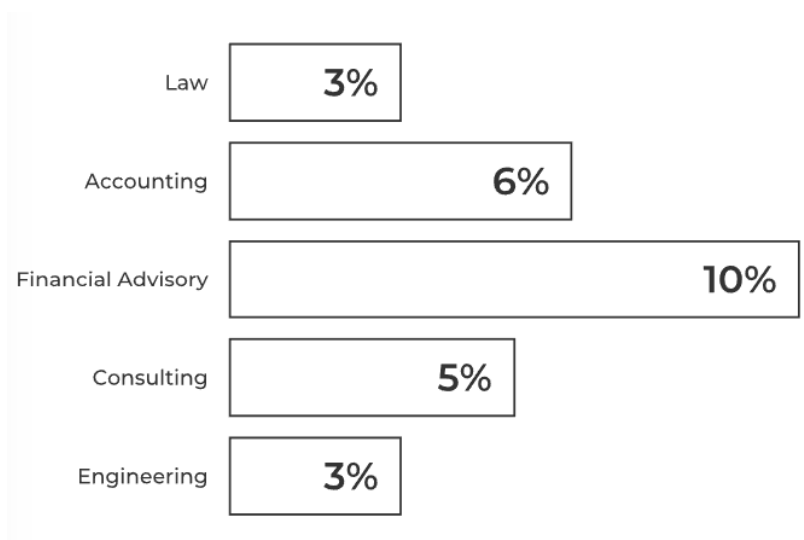
Conversely, the function with the highest percentage of highly effective ratings across all functions and industries is contact management. Nearly one-quarter of law firm respondents rate their CRM as highly effective at contact management.

WHO USES CRM FOR SALES PIPELINE MANAGEMENT

Percentage of Seller-doers who use CRM for Sales Pipeline Management

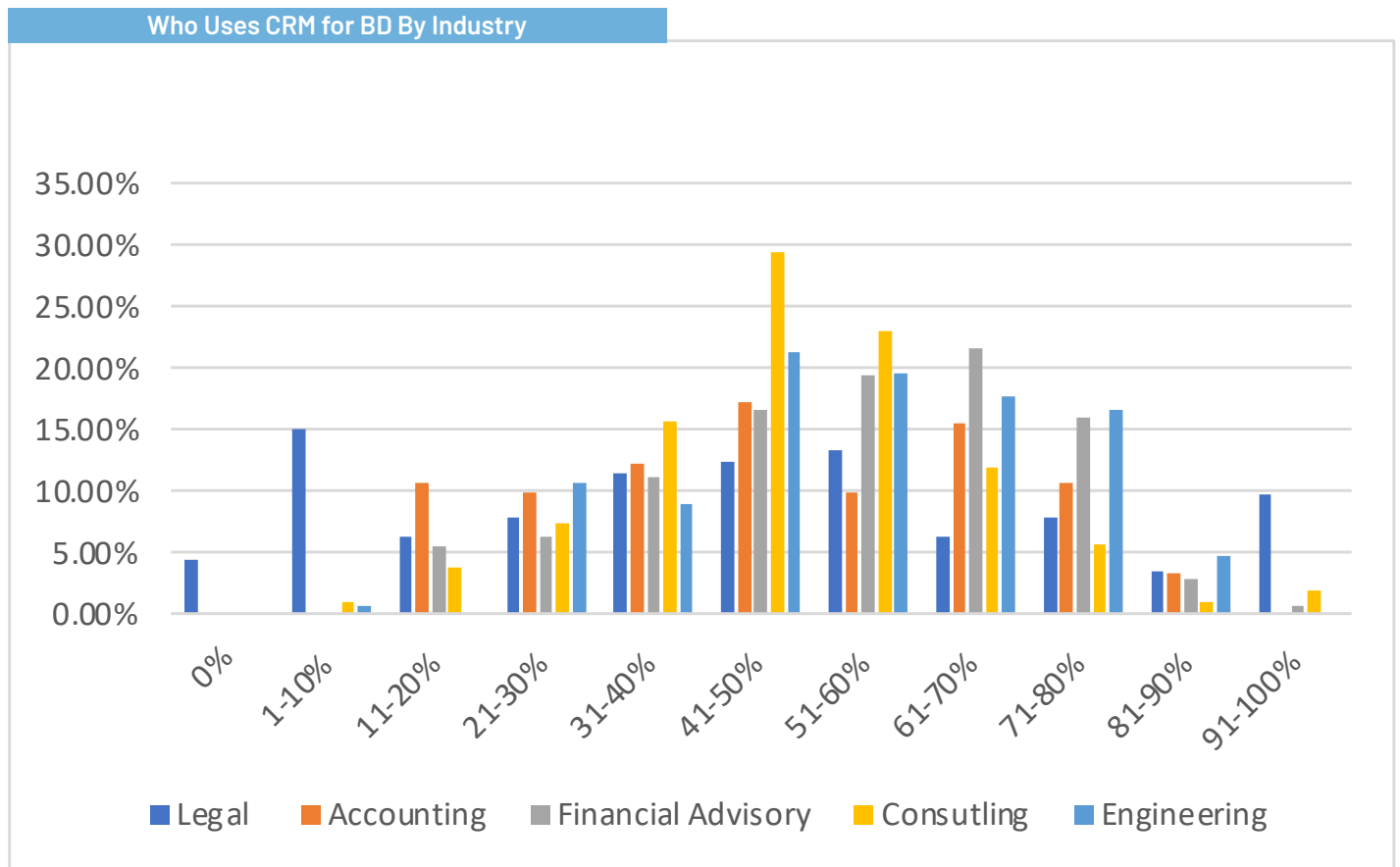
Next, the survey asked respondents, among the seller-doers who use CRM, what percentage actually utilize it for sales pipeline management regularly, regularly being defined as at least once every two weeks.

Dividing the responses to this question into the percentage of firms where seller-doers are CRM users, we get the percentage of firms where seller-doers are regularly using CRM for each industry.



While averages among the industries do not vary widely (from 45% to 55%), comparing the surveyed professional services industries reveals some interesting insights. For example, law firms report the lowest percentage overall of employees with access to CRM who use it regularly for pipeline management (46%).

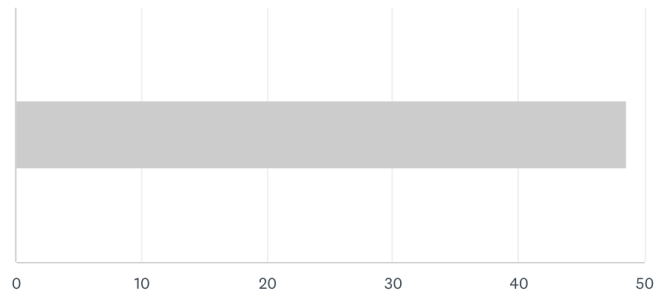
And, law firms are the only firms that report having instances where none of the people with access to CRM in their firms are using it regularly for pipeline management (business development).



Engineering firms have the highest percentage of professionals with access to CRM using it regularly for business development (55%), but only slightly more than financial advisory firms (54%).

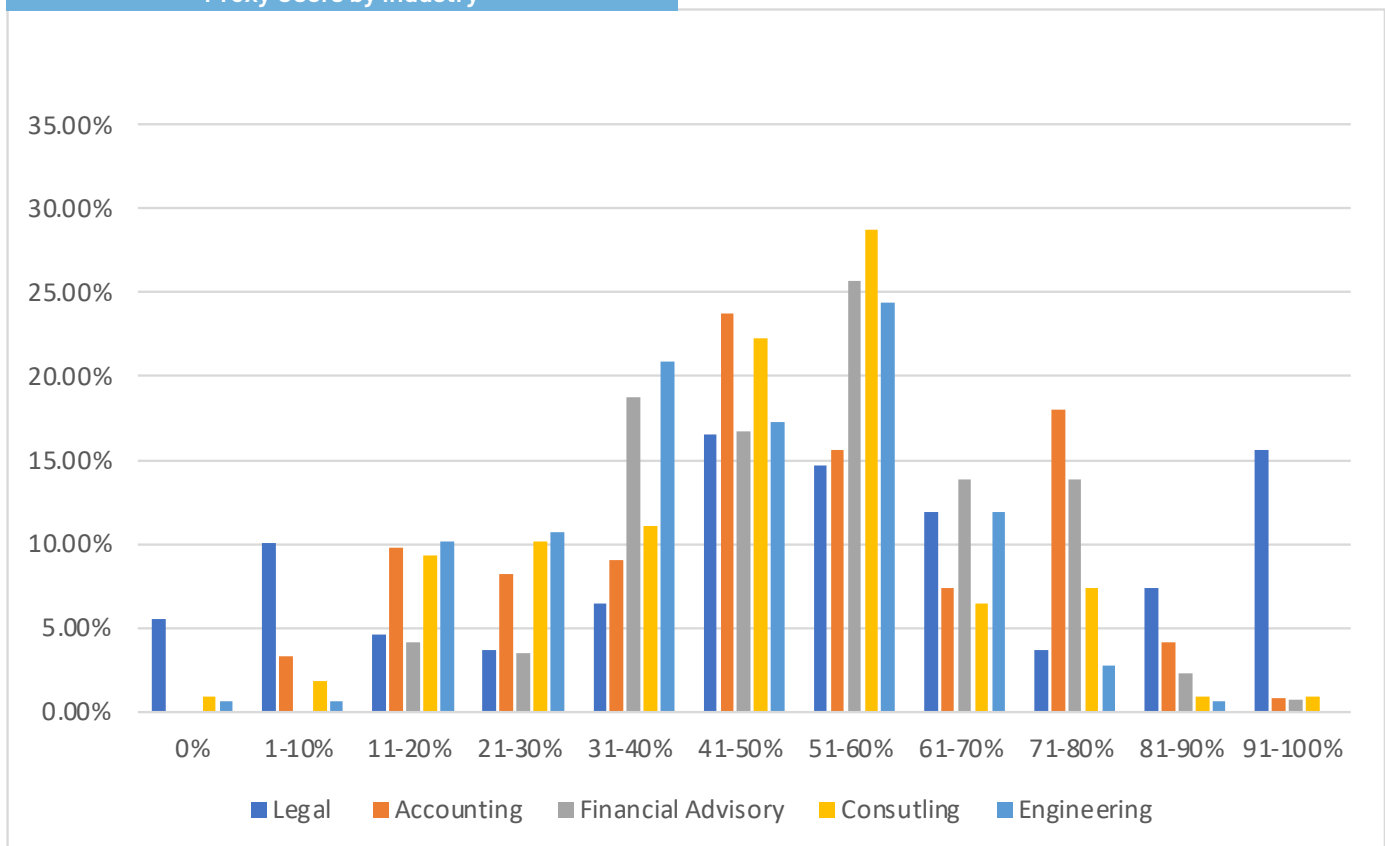
Proxy Users

We then asked respondents, of the CRM users they report as regularly utilizing CRM for business development, what percentage are proxy users for seller-doers, such as secretaries and business development managers. Perhaps not surprisingly to professional services marketing and business development leaders, the average response is nearly half (49%).



Comparing firms, slightly more than half of those using CRM for business development at financial advisory and legal firms are proxy users (53% and 52%, respectively). Engineering firms report the lowest average percentage of proxy users at 44%.

Proxy Users by Industry



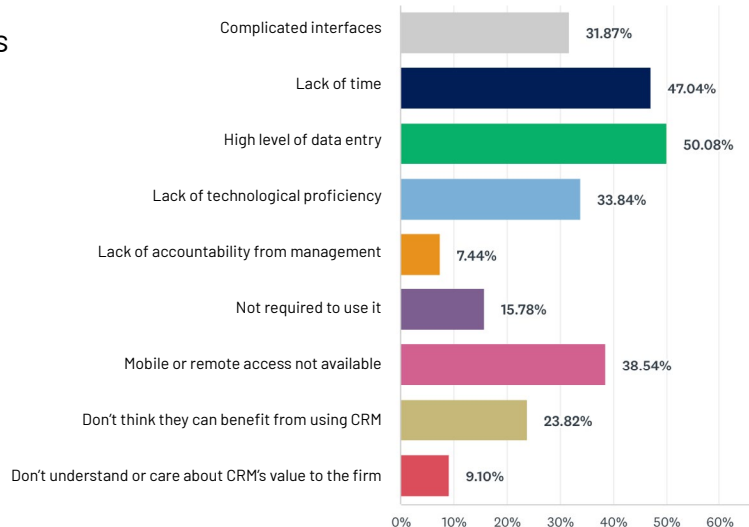
Law firms report by far the highest percentage of instances of having 91-100% of those using CRM at their firms for business development being proxy users, but also the highest, by far, percentage of instances with 0% proxy users.

CRM ADOPTION CHALLENGES

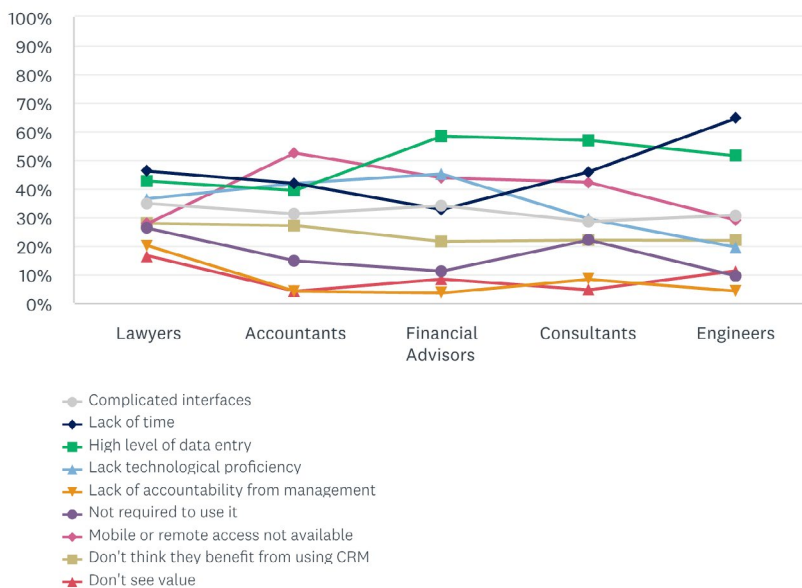
For those who do not utilize CRM for business development at their firms, the survey asked respondents to select the top three of eight factors they believe contribute to low adoption. The factor the highest percentage (50%) of firms identify is the high level of data entry CRMs require. A slightly lower percentage (47%) identify lack of time.

The factor the lowest average percentage of firms (7%) identify as contributing to low CRM adoption is lack of accountability from management. Only slightly more (9%) identify a lack of understanding or care about CRM's value to the firm. We take a further look at accountability later in the survey.

CRM Adoption Challenges



CRM Adoption Challenges By Industry



Interestingly, in comparing CRM adoption-hindering factors by types of professional services firms, nearly 65% of engineering firms cite lack of time, the highest percentage given to any of the factors by any industry. Perhaps not surprisingly, the lowest percentage given overall is by accounting firms for CRM's high level of data entry. And while lack of accountability from management is the least cited factor overall, respondents from law firms cite it significantly more than any of the other industries surveyed (20% vs. 3-8% at other industries).

A few other findings worth noting:

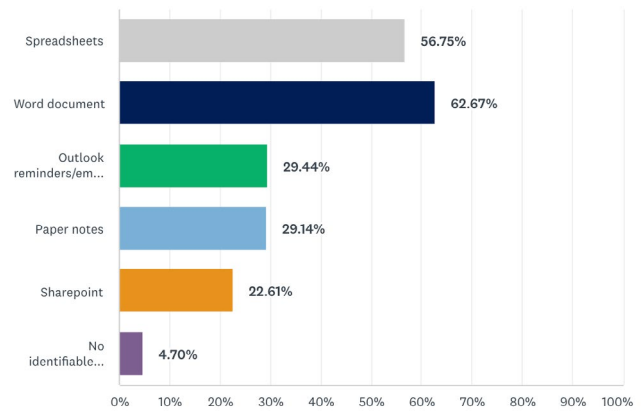
- Across professional services industries, the highest percentage of accounting firms cite mobile or remote access to CRM not being available as affecting CRM adoption (52%).
- One in four law firms and slightly fewer consulting firms (22%) report that having no requirement to use CRM is a factor negatively affecting adoption.
- The highest percentage of financial advisory firms (45%) cite lack of technological proficiency as a factor, followed closely by accounting firms (42%).

WHAT ELSE ARE FIRMS USING FOR SALES PIPELINE MANAGEMENT

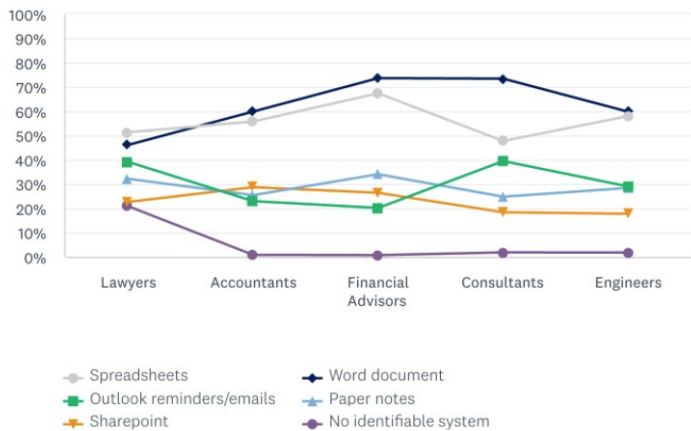
Despite all of the press about the great number of professional services firms forced to boost their technology adoption due to the pandemic, according to our survey, there are more than 6 in 10 (63%) professional services business developers still using Word documents instead of CRM. Slightly fewer (57%) are still using Excel spreadsheets.

A nearly equal percentage use Outlook reminders/emails and paper notes (both approximately 29%), and more than 1 in 5 (23%) rely on Sharepoint.

Using Instead of CRM for BD



Using Instead of CRM By Industry



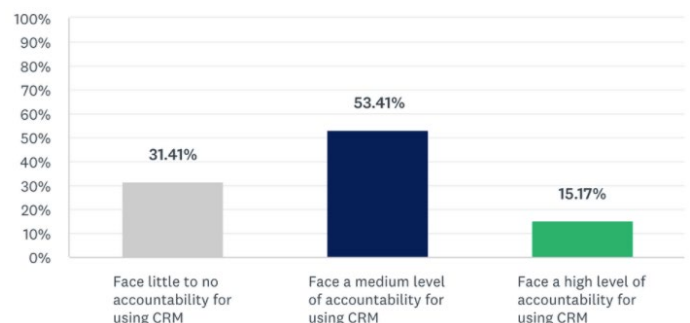
Breaking down the results by industry, nearly three-quarters of financial advisors and consultants (74% and 73%, respectively) use Word documents instead of their firm's CRM platforms for business development.

The highest percentage of professional services business developers using spreadsheets instead of CRM is also financial advisors at 67%.

SELLER-DOERS' ACCOUNTABILITY FOR USING CRM

When we asked respondents earlier in the survey to identify the top three factors contributing to low CRM user adoption at their firms, the least identified factor was lack of accountability. But in decades of work with professional service providers, we have witnessed how critical it is for leadership to have accountability measures in place for seller-doers to optimize a business development program's success.

Accountability for Using CRM



To further explore the extent to which professional services firms hold seller-doers accountable, we asked respondents to describe, based on a scale of 1 to 5, the level of accountability firms hold seller-doers to for using CRM regularly for tracking business development. Across industries, more than half (54%) of respondents report seller-doers face a medium level of accountability. And, more than twice as many say that seller-doers face little to no accountability than those who say they face a high level.

It is important to note that nearly 85% of respondents across industries report that seller-doers face either only medium or little to no accountability for using CRM regularly for business development. Yet, the same respondents also find a lack of accountability to be the least important factor in low CRM adoption.

It seems that professional services marketing/business development leaders lack an understanding of the critical role accountability makes in ensuring seller-doer user adoption.

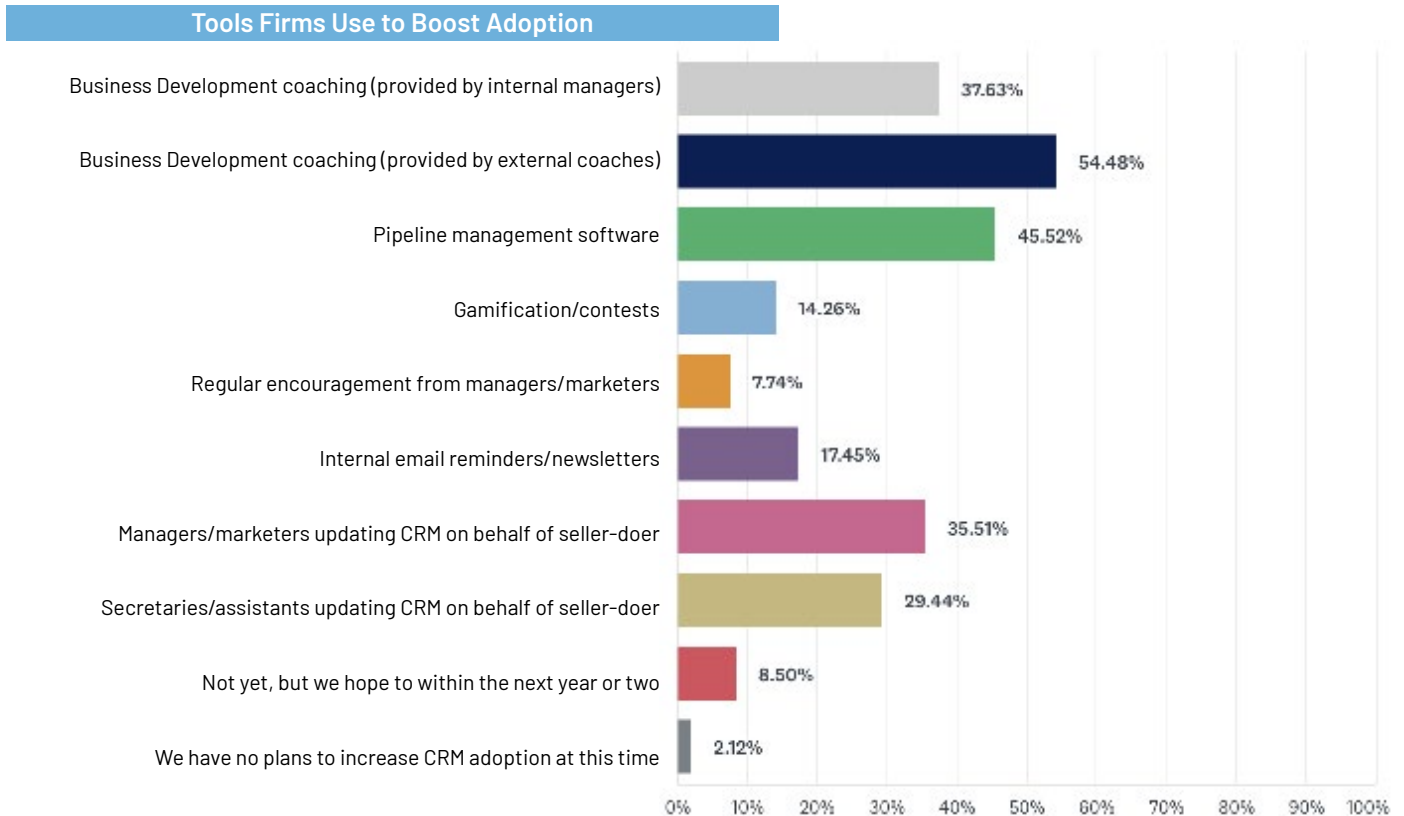
Accountability for Using CRM By Industry



Comparing industries, the highest percentage of firms reporting that seller-doers face little to no accountability are law firms, where it is the case for half of firms. Consulting firms represent the smallest percentage of firms where seller-doers have little to no accountability (16%).

TOOLS AND INITIATIVES FIRMS USE TO INCREASE CRM ADOPTION

In addition to accountability, firms can implement many other tools and initiatives to boost CRM user adoption among seller-doers. We asked respondents what their departments have used from a list of eight options.



The two initiatives the greatest number of professional services firms use are business development coaching provided by external coaches (54%) and pipeline management software (45%). Nearly one in four (38%) provide business development coaching by internal managers.

Interestingly, 36% of firms have managers/marketers updating CRM on behalf of their firms' seller-doers, and 29% have secretaries/assistants doing the same. This corresponds with our earlier finding that, together, employees and marketers make up nearly half of the CRM users at firms.

Also, a telling follow-up to our findings on the level of accountability firms hold seller-doers to for regular use of CRM for business development, the initiative identified by the lowest percentage of firms (8%) is regular encouragement from managers/marketers.

So, very few firms hold seller-doers to a high level of accountability, and, according to the research, very few seller-doers receive regular encouragement either. Marketers and secretaries/assistants do a significant amount of CRM management in lieu of seller-doers.

Tools Firms Use to Boost Adoption By Industry



It is encouraging that only 10% of respondents have not implemented tools or initiatives to increase CRM adoption among seller-doers, and more than 8% hope to within the next year or two.

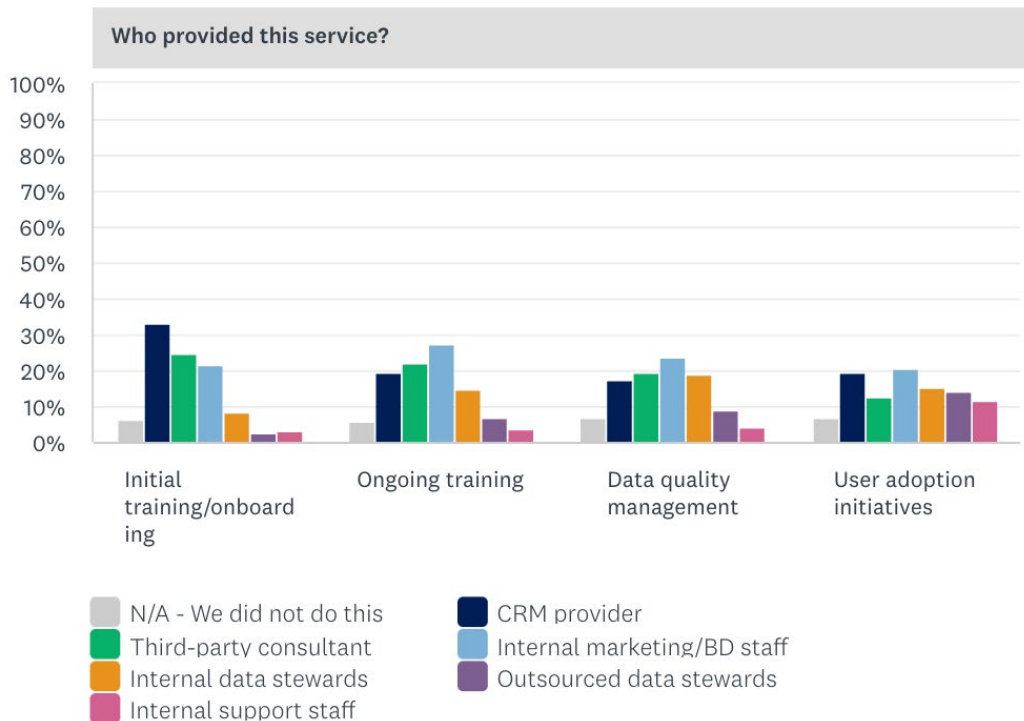
Looking at industries individually, financial advisory firms rank highest in use of external coaches for business development (67%), and law firms the lowest (42%). Conversely, law firms have the second highest percentage of business development coaching provided by internal managers (39%), with financial advisory firms reporting the highest percentage at 42%. Consulting firms use coaching by internal managers the least (30%).

Across industries, accounting firms use pipeline management software the most (58%) and engineering firms the least (35%).

Other findings worth noting:

- An almost equal percentage of law firm respondents indicate they use managers/marketers to update CRMs on behalf of seller-doers as those who use secretaries/assistants to make updates for seller-doers (35% and 35%, respectively).
- A mere 3% of financial advisory firms report giving seller-doers regular encouragement from managers/marketers, while law firms provide the most regular encouragement at 17%.
- Nearly a quarter of consulting firms report using gamification or contests to increase CRM adoption and a mere 4% of engineering firms.
- Law firms have, by far, the highest percentage of firms that have not implemented any initiatives or tools to increase user adoption.

SUPPORT SERVICES FIRMS USE TO IMPLEMENT CRM



It is important to note that even the best tools and initiatives can have little effect on a firm's on-going success with CRM for business development if seller-doers lack support when the software is implemented. Initial training/onboarding, on-going training, data quality management, and user adoption initiatives contribute to successful CRM adoption and can come from many sources. We asked respondents which types of support they offer and who provides it.

Overall, the highest percentage of firms (33%) use their CRM provider for initial training/onboarding. Perhaps not surprisingly, internal support staff is the least used resource for initial training/onboarding (3%), not counting outsourced data stewards who are not logical for this type of support.

The highest percentage (27%) of firms use internal marketing/business development staff to provide ongoing training, followed by third-party consultants (22%). Internal marketing/business development staff also provide data quality management support at the highest percentage of firms (24%). It's interesting to note that just 19% of firms used internal data stewards, and fewer than half as many used external data stewards for data quality management support.

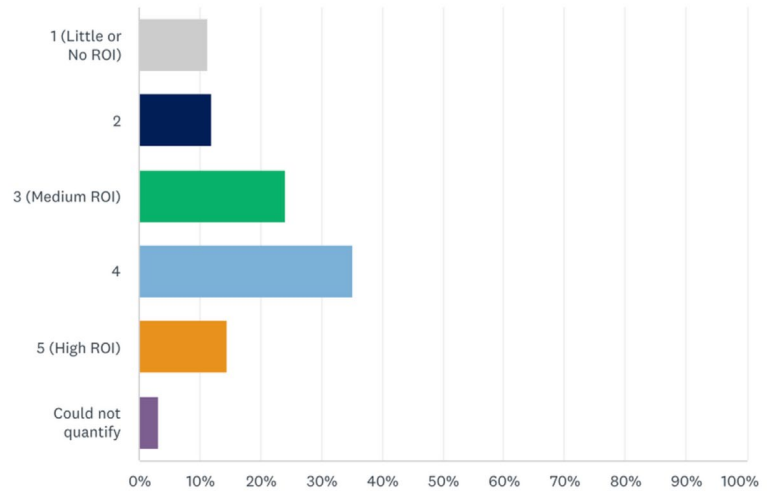
The highest percentage of firms also use internal marketing/business development staff for user adoption initiatives (20%), but an almost equal percentage use their CRM provider for adoption support (19%).

The research did not look at responses to this question by individual industries.

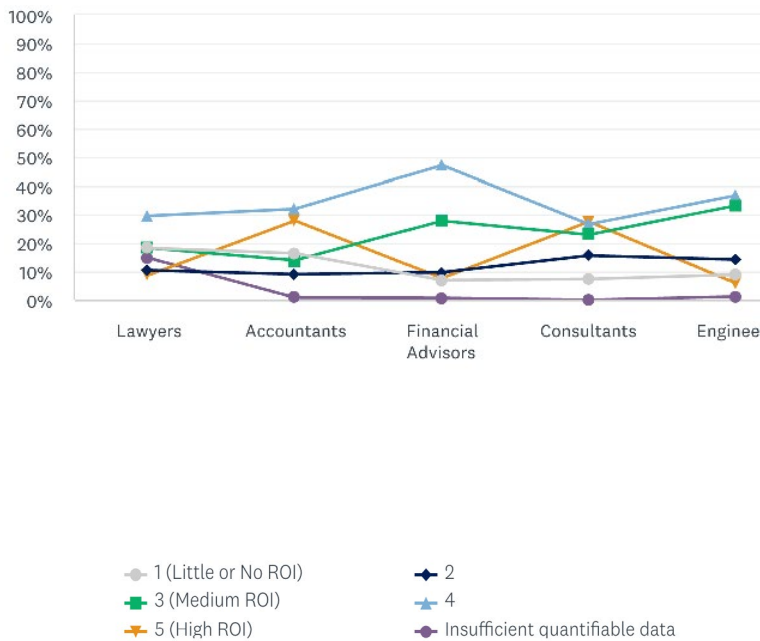
QUANTIFIABLE ROI CRM DELIVERS

Perhaps the million-dollar question is how much return on investment professional services firms get from their CRM platforms. On a scale of 1 to 5, we asked respondents what level of quantifiable investment their CRM has delivered.

Quantifiable ROI CRM Delivers



Quantifiable ROI CRM Delivers By Industry



A significantly higher percentage of accounting and consulting firms (both approximately 28%) report that their CRMs deliver a high level of ROI.

Engineering and financial advisory firms report the lowest percentages of little to no ROI and the highest percentages of level 4 ROI (37% and 47%, respectively).

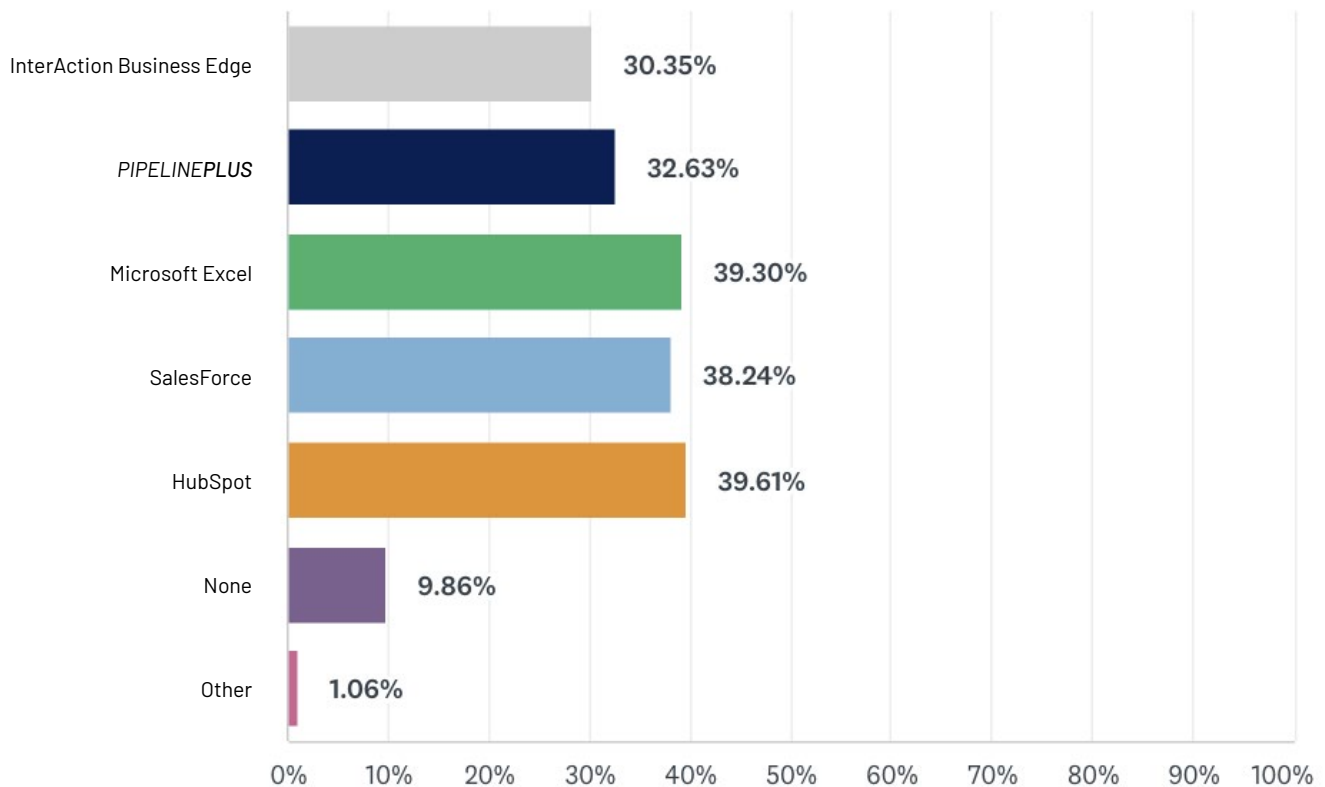
Law firms report the highest percentage (18%) of little to no quantifiable ROI from their CRM, followed closely by accounting firms (16%).

PIPELINE MANAGEMENT PLATFORMS USED BY FIRMS

We then asked respondents which of six pipeline management tools they use at their firms. The usage across pipeline management tools is fairly evenly distributed. However, what is notable about this finding is that one of the choices, Excel, is not a pipeline management platform, and nearly the same percentage of firms report using it as do the most used tool, HubSpot (39% vs. 40%, respectively).

About four out of ten professional services firms are still using spreadsheets for pipeline management.

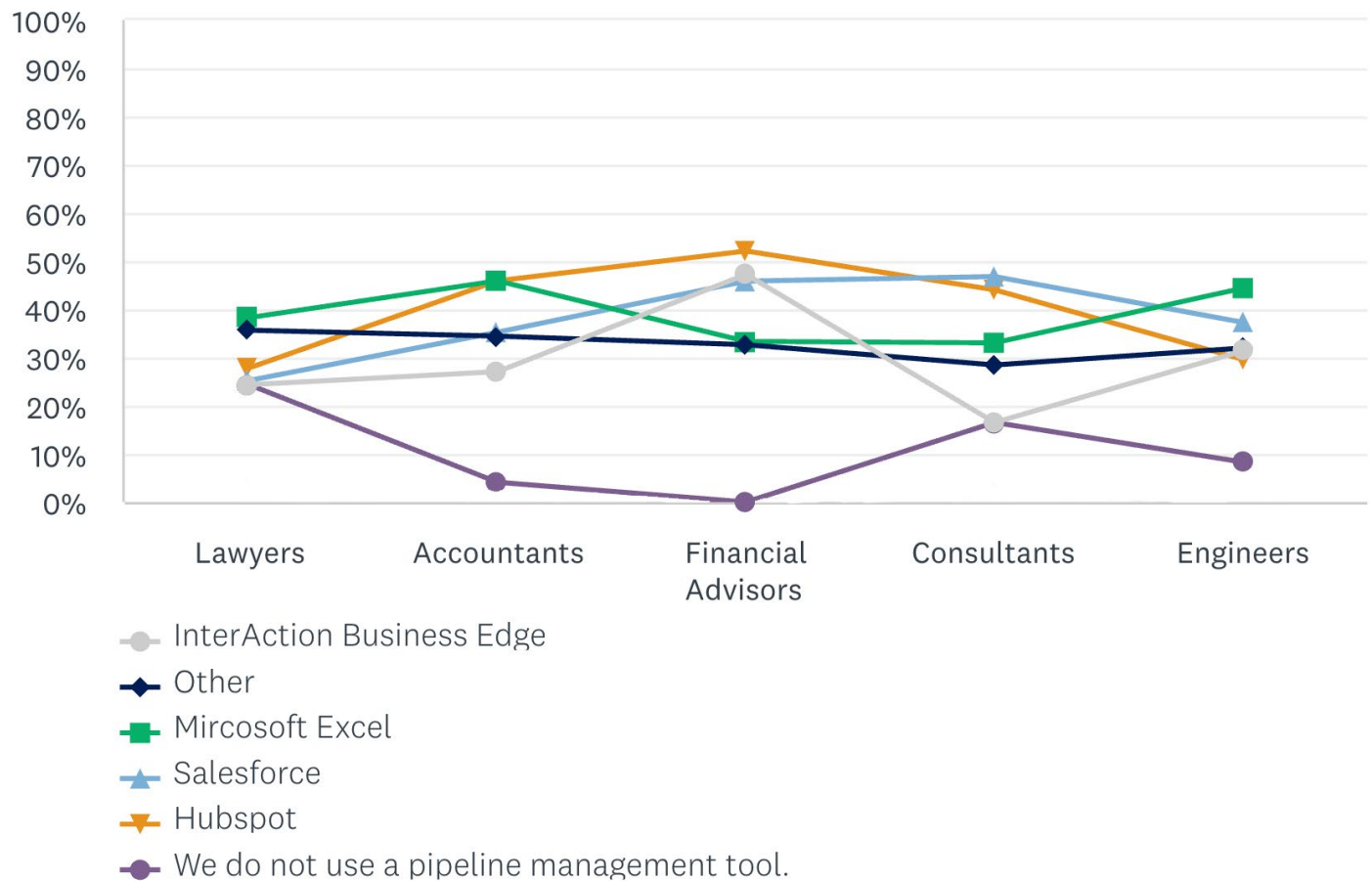
Pipeline Management Tools Used



Looking at the responses by industry reveals some additional surprising findings:

- Nearly one-quarter (24%) of law firms do not use a pipeline management tool.
- Of all pipeline management tools, the one used by the highest percentage of law firms is Excel, followed by PIPELINEPLUS.
- Excel and Hubspot tie as the top used pipeline management tools for accounting firms (46%).
- Excel and Hubspot tie as the top used pipeline management tools for accounting firms (46%).
- More engineering firms use Excel (44%) as a pipeline management tool than any other tool.

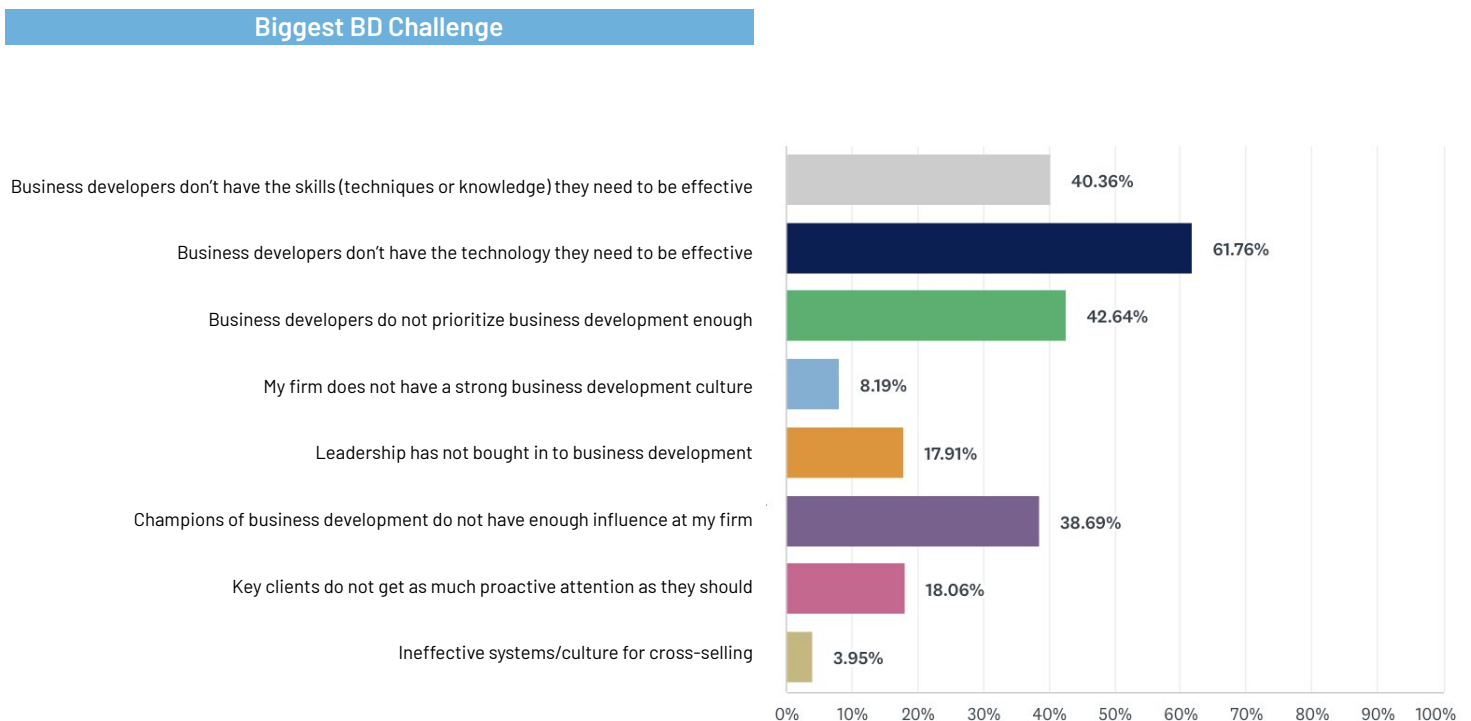
Pipeline Management Tools Used By Industry



FIRMS' BIGGEST BUSINESS DEVELOPMENT CHALLENGES

Our survey concluded by asking respondents to share their biggest business development challenges during normal market conditions.

More than 6 out of 10 (62%) report that business developers don't have the technology they need to be effective.



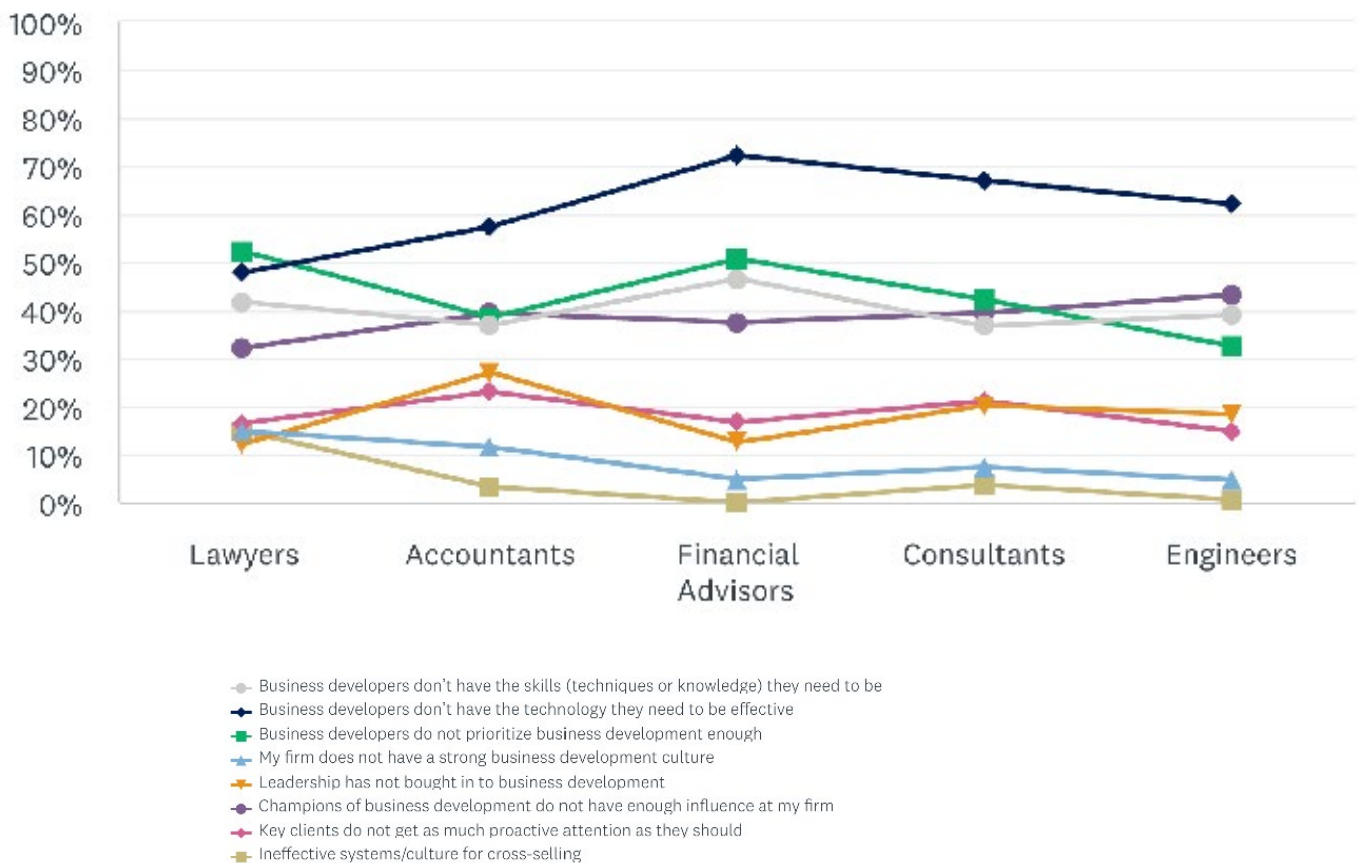
Lack of technology is a bigger business development challenge for professional service firms than business developers not prioritizing business development, not having the skills to be effective, and business development champions not having enough influence at firms. However, it is mostly marketing/business development leaders who voice this as their biggest challenge.

The business development challenge firms cite the least (4%) was ineffective systems or culture for cross-selling.

Comparing biggest development challenges by industry, business developers not having the technology they need to be effective is the most cited challenge for all industries except law firms. Law firms report that their biggest challenge is business developers not prioritizing business development enough.

Technology is a challenge for the highest percentage of financial services firms, at more than 72% of firms.

Biggest BD Challenge by Industry



Other interesting industry-specific findings include:

- More than half of financial advisory firms report that business developers do not prioritize business development enough.
- While not widely cited by any industry, a notably higher percentage of accounting firms report their biggest challenge as leadership not buying into business development.
- Significantly more law and accounting firms report their firms not having a strong business development culture as a challenge.

CONCLUSION

Since the onset of the COVID-19 pandemic in the first quarter of 2020, professional services firms have experienced a digital transformation, with even the most conservative and tech-averse industries quickly pivoting to enable remote work and meet rising client demands. With traditional business development activities like in-person meetings, conferences, and networking events put on hold indefinitely, firms quickly learned to rely on webinars, podcasts, blogs, virtual events, and social media to gain business development leads and nurture relationships through the funnel.

But no matter what the tactic, business development takes consistent and persistent work. Busy service professionals, who are notoriously more interested in and comfortable doing the billable work they were trained to do, rely on marketing and business development leaders to provide the training, systems, and tools to make business development possible.

Unfortunately, as our research shows, while more than 9 out of 10 professional services firms have a CRM platform, few report getting a high, quantifiable return on investment from it. And, while firms find their CRM to be effective for a few marketing/business development functions, 85% find it ineffective for pipeline management, which is a crucial aspect of growing firm business.

What's more, our research shows that very few users in professional services firms are seller-doers, and only about half of those with access to their firm's CRM regularly use it for business development. Of those not using CRM for business development, more than 6 out of 10 use Word documents instead. In other words, the sales force at these firms is not using an effective sales system.

So why are firms' CRM platforms not being widely used for pipeline management?

It may not be surprising to professional services firm marketers/business developers to learn that nearly half of our respondents cited the amount of data entry CRM requires as the leading barrier to adoption and a slightly lower percentage lack of time.

Do professional services firms hold seller-doers accountable for using CRM?

The results on this topic were troubling. When asked about factors that contribute to low CRM adoption, the lowest average percentage of firms identified lack of accountability from management. Yet, nearly 85% of respondents indicated that seller-doers face only medium or little to no accountability for using CRM regularly for business development at their firms. It would seem that professional services leaders lack an understanding of the critical role accountability makes in ensuring seller-doer CRM user adoption.

As an alternative to leadership-driven accountability, nearly 55% of firms use external business development coaching, and more than 45% use business development pipeline management software.

When asked about their usage of pipeline management tools specifically, more than 9 out of 10 firms reported that they at least used something; however, firms report using Excel spreadsheets nearly as much as the most often cited pipeline software platforms (HubSpot and PIPELINEPLUS respectively).

Despite the digital transformation journey professional services firms quickly embarked on when the pandemic hit, they still rely heavily on Word documents, Excel spreadsheets, and even paper for business development and pipeline management – table stakes digital tools introduced before the digital transformation even began.

PIPELINEPLUS is a relationship management system for the busy professional. With a simple, intuitive interface, it solves many of the biggest challenges associated with low CRM adoption like excessive data entry and constrained time.

With our quick setup process, users have a sales pipeline up and running in just 5 minutes. PIPELINEPLUS prioritizes users' most important relationships so that business developers stay focused. It also provides AI-powered insights and recommendations on how to close new business, addressing the business development skills gap cited by many firms in this study.

Built-in tutorials provide business development best practices, so business developers always know what to do next.

PIPELINEPLUS integrates with Outlook calendars and can be used as a standalone tool or integrated with CRM as a power app to boost pipeline adoption.



To learn more, visit www.ackertinc.com
or [contact us](#) with any questions.



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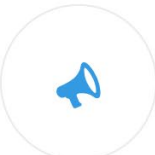
**SALES AND BD
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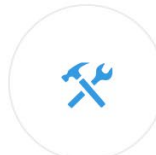
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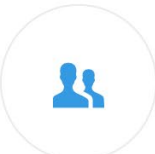
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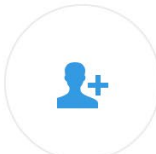
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CONSULTING



FRACTIONAL CMO



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