

CFO Consulting Partners is using PieSync's Intelligent Syncing to connect Highrise and Outlook



CFO Consulting Partners is a team of professionals who provide Financial Management Services to CFO's, CEO's and Boards of SME's, typically with sales ranging from \$25 to \$300 million. They focus on the nuts and bolts of Finance: accounting, reporting & analytics, budgeting & forecasting, process, systems, transaction support and temporary talent substitution.

www.cfoconsultingpartners.com

"Before PieSync, syncing our data to a CRM was more of a hassle than an advantage. We needed to keep the categories we were using in Outlook. That was the base of our internal lead tracking and no other cloud integration software was offering that possibility"

Scott Magill - Director at CFO Consulting Partners

The Challenge

CFO Consulting Partners (CFOCP) has 20 employees providing senior-level financial management and accounting services. Virtually all of their projects have been obtained through out referrals.

Each consultant at CFOCP has an Outlook account with their individual contact information, some relevant to CFOCP; some not. They developed a system in which everyone was using the same categories to organize their contacts. They classify contacts per industry, company, friend of the firm, influencer, competitor, etc. They are managing over 30 categories. In a

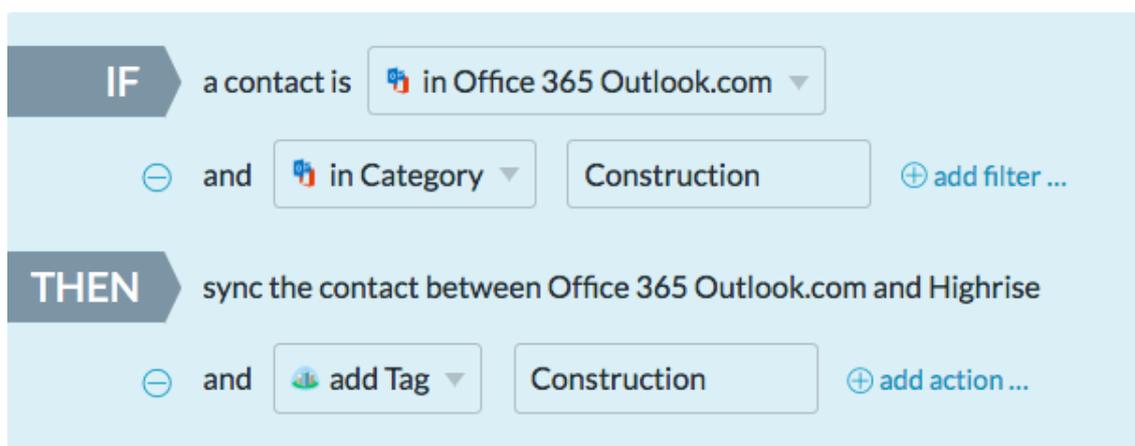
business where trust is what closes deals, to have the right references and contacts around the client is the key.

When Scott Magill, Director of CFO, realised his firm needed a CRM, he knew he was facing a big challenge. How to add all the contact data of each Partner to a CRM like Highrise without losing their organization system?

“I was looking everywhere for a solution, there was not a single software that will allow me to sync without losing all the categories we were managing, which was something essential for us.”

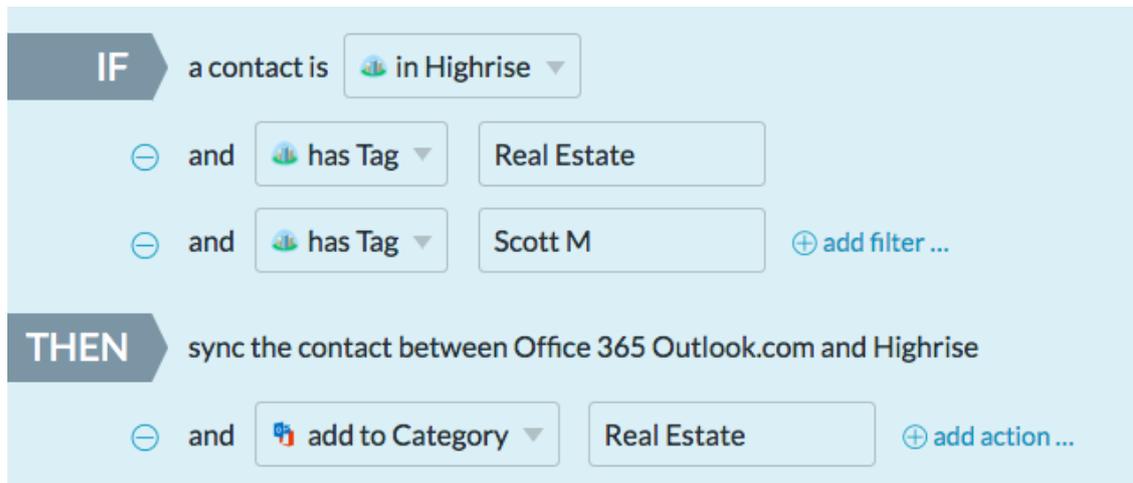
How PieSync Helped

PieSync’s new feature “Intelligent Syncing” enables the algorithm “If-This-Then-That”. Which allows Scott to choose which tags, categories or lists to sync and how to.



“Intelligent Syncing makes PieSync the most advanced sync engine out there” Says Scott- “Each of my partners is now connected with Highrise and we have there all the information we need to reach out existent or potential clients. That’s the new core of our business. Thanks to PieSync’s new feature we all have this information in the same place, up-to-date and anyone of us can access to it whenever we need it.”

CFO is also benefiting from the possibility of a 2-Way Sync. Next to the sync from Outlook to Highrise, they now use some tags in Highrise that are being added to their Outlook categories. This allows updates in Outlook to be synced to Highrise and from Highrise back to Outlook, even updating multiple Outlook instances with a single correction.



Results and future plans

Scott Magill and his team at CFO Consulting Partners, see an enormous potential in working with PieSync.

Gathering the categories and tags from both Highrise and Outlook, they now have a database extremely well segmented. That's why their next Marketing project is to implement personalized Email Campaigns.

By creating an Intelligent Syncing between Highrise and Constant Contact, they will be able to reach out their clients with a targeted emails, an initiative that promise high levels of engagement.

About PieSync

PieSync works in the background and syncs your contacts two-way and in real time. This means you'll have access to the most up to date customer information, no matter where you are or who entered the data. PieSync will help you to:

- ▶ Save time spent on data entry
- ▶ No more import/export of your contacts
- ▶ One database across all your cloud apps
- ▶ Sync changes, including deletions and unsubscribes, in your favorite cloud apps and CRM
- ▶ Keep track of your contacts, so you never lose a contact again
- ▶ Share accurate customer information across your marketing, sales and customer service platforms.

Try PieSync FREE for 14-days at piesync.com.