



IN DEPTH CASE STUDY

# **A holistic approach for increased visibility of opportunities**



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## Pitcher Partners Sydney

With over 250 staff Pitcher Partners Sydney turned to Symphony APS to help them gain greater visibility of the opportunities being pursued in the practice.

The accounting, auditing and business advisory firm looked to CRM experts, Symphony APS, to meet the challenge of getting stronger collaboration between the systems and team. The move to a new centralised system, truly integrated, would help unlock the doors to enable opportunities with both prospects and existing clients.

Adam Irwin, Chief Operating Officer, Pitcher Partners Sydney says: “Future proofing the accountancy practice was top of the agenda with the main purpose of centralising systems for increased efficiency and visibility, but we needed to link different systems, with multiple data sources, to achieve this. Initially, through its Envision process of analysing our existing systems, Symphony helped us to understand the key drivers and inhibitors to making the proposed changes within the business. Once this process was complete, they partnered with us in deploying a client lifecycle management platform offering consistency of communications to clients, prospects and contacts. It’s tailored to our business.

“The platform integrates a number of disparate systems including CRM, time and billing, marketing automation and compliance. In doing so, it provides a ‘single source of truth’ and the potential for us to automate a number of repetitive and compliance-based tasks.”

### Cloud-based and mobile CRM

Adam explains: “This whole process of change is assisting the practice in continuing its shift from predominantly compliance based to more of a consultative client focus. It has also allowed us to move, or at least start to move, a number of business activities into the cloud meaning an employee can log and complete any elements of the system on the move rather than when they return to the office.”

With reconciliation and billing accuracy crucial for an accountancy practice to meet targets and increase revenue growth, the introduction of mobile CRM offers improved professionalism in marketing and communications across a practice. Symphony’s mobile CRM and mobile timesheet solution, TimeCapcha, integrates into any practice management system and is easy to use whether you use tablets or mobile phones, iOS or Android.

### Centralise for a holistic view

Adam says: “With Symphony’s expertise, we’ve now got a complete holistic overview of clients and potential prospects. The integrated system has not only allowed us to centralise solutions, providing full visibility across the entire practice, but also to develop systematic automation to some key compliance processes and repetitive tasks positioning us as consultative rather than compliance based.” “Symphony had a great understanding of our business and intimate knowledge of the key systems used within the practice. Therefore, they were able to provide a truly tailored solution. Their team’s willingness to work with the practice to arrive at outcomes tailored to our requirements and being prepared to start the process without having all the answers and then invest the time in finding them is second to none,” adds Adam.

### About Pitcher Partners Sydney

With a revenue in excess of \$50m (AUD), Pitcher Partners Sydney is an accounting, auditing and business advisory firm providing personal service and quality advice to high wealth individuals, small to medium public companies, large proprietary companies, local government, Not-for-Profit organisations and privately-owned businesses.

An independent national association of firms, Pitcher Partners Sydney is an independent member of Baker Tilly International - one of the world’s leading networks of independently owned and managed accountancy and business advisory firms united by a commitment to provide exceptional client service. Pitcher Partners Sydney is able to call upon 125-member firms in 147 countries around the world to provide its clients with local expertise in all major overseas marketplaces.

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Adam Irwin Chief Operating Officer,  
Pitcher Partners Sydney



## About Symphony - APS

At Symphony we are relentless in our pursuit for new methods that transform Accounting Firms and their Clients

We aim to see the whole picture. We analyse, we work to understand all the issues that are holding you back.

Since 1999 Symphony has been partnering with Accounting Firms, initially in practice management software solutions and then CRM in 2012. Overtime we have evolved to develop holistic, across-platforms expertise. It's a best of both worlds capability – mixing application software and technical disciplines with a consultative capacity to strategise for overall company systems.

When a firm's systems are truly integrated and access is easy across the organisation, teams have the means and freedom to build their all-important client relationships.

### Technology Deployed

SymphonyCRM (powered by SugarCRM)  
SymConnect – Integration Platform  
SymphonyBPA - Automation  
Symphony – TimeCapcha

### Integrated to

Advance Practice Management  
Advance Practice IQ  
iManage Document Management Outlook  
Act-On – Marketing Automation  
Virtual Cabinet – Planned  
InfoTrack – Planned

## Get in touch

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