

# Advanced data collection got H/Advisors Abernathy on top of customer care

Read how H/Advisors Abernathy organized their contacts across 60+ employees in 5 offices and how they brought the customer experience to a higher level.

The company grew every year, and the change became inevitable

It had to come. The IT Manager faced a difficult challenge to choose and implement a contact management tool for organizing customers data across the entire organization. Each of the 60 people in 5 offices situated in different parts of US used shared Public Folders in Outlook, they also shared the struggles that come with this approach. As their database contained data about the European customers, the GDPR legal act stood threateningly above all of them.

Imagine a company with a history of 35 years changing the workflows and mindsets of the consultants. In H/Advisors Abernathy, people had no experience with a CRM software or its customized implementation.

The starting lineup in the managers thought process was Microsoft Outlook as it was used by all on daily basis. After exhaustive testing of more than 20 softwares the decision was made. It provided a full integration with Outlook, including mobile app.

**H/ADVISORS**  
*Abernathy*

## **H/Advisors Abernathy**

is a communications company that specializes in advising CEOs, board directors, and senior executives on effective stakeholder communications, engagement, and advocacy initiatives in today's dynamic and interconnected world. The headquarters is in Manhattan and there are offices in New York, Los Angeles, San Francisco, Houston, and Washington DC. The consultants are in daily contact with the clients personally, on mobile or by email. It is buzzing in this business beehive.

## The primary goal looked simple, but the opposite was true

**A professional contact management software was needed,** and it had the highest priority. Any functions for project management or time tracking didn't provide an added value at that moment. It started with extensive research consuming several months. The goal was to find a software to track corporate contacts in a familiar way, ideally **integrating with Outlook**.



The challenge was to implement different processes and databases into one system. In the beginning, each person had their own contact database, if anything at all, and it was not shared with colleagues. When working with documents there were difficulties with competencies for modifications or working with folders. The contact profile had to be modified to meet the company's needs, e. g. include informed consent, basic and additional information, contact details, etc.

The CRM software had to be **flexible** and should not require extensive consulting to get it modified to meet their needs.

## Implementation was trouble-free

Bill Dana, the Director of Information Systems in H/Advisors Abernathy, was able to do a lot of the **customization** within his team. We only needed to provide simple support with a quick response time.

His colleagues were happy with the **intuitive user interface**, and we trained the IT staff who shared the knowledge with their colleagues.

The process took some time. However, it went smoothly. He asked all team members to provide recorded contacts and then started a detailed cleaning. The final version of the contact database was later implemented into eWay-CRM. The users had limited rights to edit the contacts, so they weren't able to delete it by accident or create duplicate contacts.



## Final solution leads to absolute control

The manager appreciated the permission controls within each module, which enables the control of user's rights based on modules and various fields within the CRM software.

The module which came first and was highly modified was the Contacts. A few custom fields and organized contacts were created and later cleaned up. It was essential to create a single company record and then associate it with the various contact persons. Now there is a central location for contacts which was not possible when the contacts were spread around in different software and formats.

The integrated bulk email module and statistics are critical for them to do targeted mailings.

Now all the eWay-CRM modules are actively used. The Deals were added in the middle of the first year of usage. And the Journal provides valuable records of regular communication with clients.

eWay-CRM is installed on every desktop computer in the office as well as on every mobile device. And eWay-CRM is used by all the employees in all the branches.



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After getting setup with a trial license I was able to modify the system to meet our needs with just a little guidance. The system operates with minimal support and training is simple because of the familiar look and feel of the software. This along with the integrated bulk email feature made the decision for us. My responsibilities include compliance and data privacy and having all our company contacts in eWay-CRM makes it easier for us to demonstrate we are complying with the laws and regulations across the US and abroad.

William Dana, Strategic Communications Counsel, H/Advisors Abernathy

4

man-days  
for implementation,  
data import  
and training

5

branches

60

employees