

CRM and the Professional Services Organization: Understanding Relationship Intelligence and Its Benefits



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Introduction

Customer Relationship Management (CRM) is one of the most potent business strategies to emerge in recent years. Its allure is rooted in common sense which dictates that the more an organization knows about its customers and the closer the relationships it can forge with them, the better it can serve their needs and the more it can sell.

Indeed, so powerful is the notion behind CRM that a virtual economy has formed around it. According to the analyst and research firm, The Aberdeen Group, the worldwide market for CRM products and services will grow from \$13.7 billion in 2002 to \$27.8 billion by 2005.¹

While virtually all sectors of the business economy are engaged in CRM, the role it plays within professional services organizations (PSOs) is entirely different than in the broad-based corporate marketplace. The reason? The business models of most PSOs differ widely from their corporate brethren. For example, PSOs do not sell discreet, manufactured goods or simple services – they market the skill, expertise and judgment of their professionals. *What* PSOs sell, is different.

Products-oriented businesses deploy legions of mid-level sales force and call center personnel whose sole responsibility is to sell and support inventory manufactured by other divisions within the organization. At PSOs, the high-level professionals who deliver services on client engagements and who frequently own part of the firm simultaneously are tasked with sales and business development responsibilities. *Who* does the selling at PSOs, is different.

Traditional corporations also rely upon a repetitive sales cycle and predictable sales modeling to fill the pipeline and convert “suspects” to “prospects” to “customers.” The business development profile at PSOs, however, is unique and opportunistic, necessitating the formation of one-to-one relationships between the professionals who will be delivering the services and the prospective client in order to determine whether a new engagement opportunity exists and whether the PSO has the requisite skill and expertise to accommodate the client need. *How* PSOs sell, is different.

Moreover, products-based companies can leverage mass-market channels to sell regardless of whether personal relationships exist between the organization and prospect. In contrast, because relationships play such a critical role in establishing credibility, trust and competence, PSOs must be present to prospective clients wherever they are – whether in the boardroom or at the country club – in order to develop the type of one-to-one relationships that lead to new engagement opportunities. *Where* PSOs sell, is different.

Finally, traditional corporations can generate additional demand for their products by adjusting price, credit availability or other sales terms. But in the professional services setting, PSOs cannot create artificial demand for their services. A lawyer cannot say to a client, “we’re nearing quarter’s end and our revenue numbers are low, can you get sued so that we can get the business?” An investment banker cannot encourage a client company to go public simply because the investment bank needs the commission. *When* PSOs sell, is different.

In light of the significant contrasts that exist between the business model of traditional corporations and PSOs, it follows that the CRM solutions catering to products versus services organizations must also be different if they are to have relevance. And while volumes of information have been published on the business benefits of CRM in traditional corporate settings, very little has been written on the subject as it pertains to PSOs.

This white paper defines CRM as it relates to PSOs and spells out the unique business value firms can expect when they implement Interface Software’s InterAction®, the leading CRM solution for professional services.

¹Worldwide CRM Spending: Forecast and Analysis 2001-2005, Aberdeen Group © 2003

Definitions

There is significant confusion in the marketplace as to what exactly CRM is. It's therefore useful to establish a working definition upon which to build.

For PSOs, CRM can be defined as a business strategy leveraging Relationship Intelligence that enables firms to exceed client needs and expectations as well as revenue and productivity objectives. Relationship Intelligence is defined as a firm-wide asset that reveals the unique and complex connections between people, companies, relationships, experience and expertise, empowering professionals to leverage who and what they know to uncover new revenue opportunities, differentiate themselves from the competition and enhance client service.

Because CRM is not simply a technology, but a business strategy, it must be closely aligned to the PSO's strategic objectives as defined by firm leadership. Firm culture and business processes must likewise support the firm's CRM strategy.

One of the important distinctions between traditional CRM and CRM for PSOs is the knowledge asset defined above called Relationship Intelligence. Information possessed about people, companies, relationships, experience and expertise is used in all facets of a PSO's business – from reducing costs, uncovering new engagement opportunities, cross-selling services and executing tailored communications, to properly staffing engagements, improving client service and increasing operating efficiencies.

Accordingly, for a CRM strategy to be successful, the firm must have a means to aggregate its collective knowledge about people, companies, relationships, experience and expertise, and transform this scattered data into Relationship Intelligence. It must also have a means to centrally manage this intelligence and a means to deliver it to professionals, when and where they need it. These are the most crucial functions that InterAction performs, the benefits of which are discussed at length in this white paper.

Why is a technology infrastructure required to support a firm's CRM strategy? When firms are very small and comprised of just a handful of individuals, the process of leveraging Relationship Intelligence is done organically through human interaction. Firm meetings, chance conversations in the hallway or around the water cooler are sufficient to keep everyone apprised of critical happenings within the firm, important relationships being formed, work being pitched to prospects and engagements currently being undertaken.

However, as the firm grows in size and expands geographically, these natural human interactions that lead to idea generation, human networking and opportunity identification become impossible to sustain. As a result, one of the most natural and productive dynamics PSOs have for leveraging their knowledge about people and relationships breaks down – threatening the firm's growth potential, image, client service and retention capabilities.

To avoid the inevitable breakdown that comes with success and growth, PSOs must adapt by supplementing the human network with a technology infrastructure capable of mimicking it on a larger scale. This is where InterAction fits into the CRM strategy – by providing a centralized architecture capable of aggregating, managing and delivering Relationship Intelligence to users whenever its needed, wherever they are, in whatever technology environment they prefer.

Business Benefits

Once InterAction has aggregated a firm's scattered data and transformed it into a leverageable asset called Relationship Intelligence, its impact within the organization is far reaching. Below are some examples of the business benefits that Relationship Intelligence provides through InterAction:

Ensuring Proper Client Management Means Fewer Client Defections

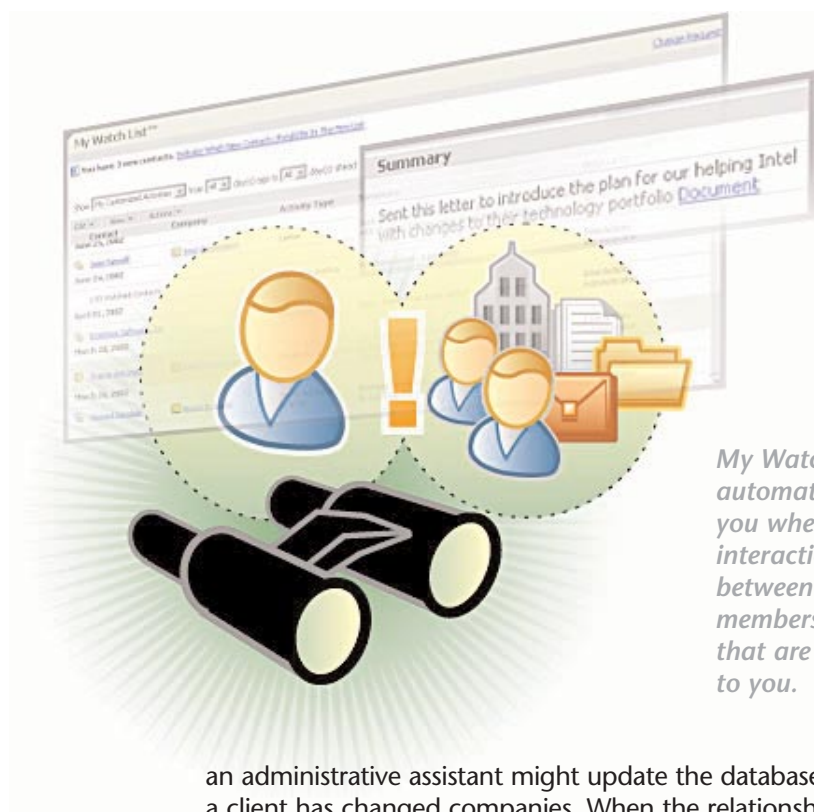
To spot opportunities, potential risks and otherwise effectively manage the client relationship, it is critical to have a global snapshot of all firm interactions that are taking place with individual clients and contacts. This is especially important when multiple individuals within the organization interact with the same client regularly.

A good example to illustrate this point came from a financial services prospect, which employed "client deal teams" that were dispersed between their East coast and London offices. This firm had no efficient way to keep everyone apprised of what was happening with the client at any given time, which often led to mishaps that reflected poorly on the firm. In an attempt to deal with the problem, the deal teams would have to gather their client communications on a daily basis, piece them together and fax or e-mail the document to other offices. This was inefficient and could lead to a delay in communicating important transaction developments.

InterAction's My Watch List™ feature helped eliminate the complexities of keeping everyone apprised of firm interactions with the client. My Watch List will automatically notify users when relevant interactions occur between other firm members and

important contacts. For instance, a client relationship manager can automatically be notified when anyone in the firm has a meeting, phone conversation or correspondence with an important contact – eliminating the risk of embarrassing mishaps that occur when one hand doesn't know what the other is doing.

My Watch List also keeps relationship managers apprised of potential risks and opportunities to their clients. For instance,



My Watch List™ automatically notifies you when important interactions occur between other firm members and contacts that are important to you.

an administrative assistant might update the database when notification is received that a client has changed companies. When the relationship manager sees this update via My Watch List, two red flags immediately are raised – risk and opportunity. Risk that a key contact has left the company, prompting him to follow up to determine who will be

replacing the contact and initiate a relationship with that replacement. This update also spells potential opportunity, prompting the relationship manager to phone the contact at his new place of employment, congratulate him on his new position, and inquire whether the firm's services might be needed there.

By providing instant and automatic visibility into the myriad interactions occurring between the firm and client, InterAction takes the guesswork out of effective client management, enabling PSOs to provide better, more seamless service.

Increasing Cross Selling and Upselling Revenues

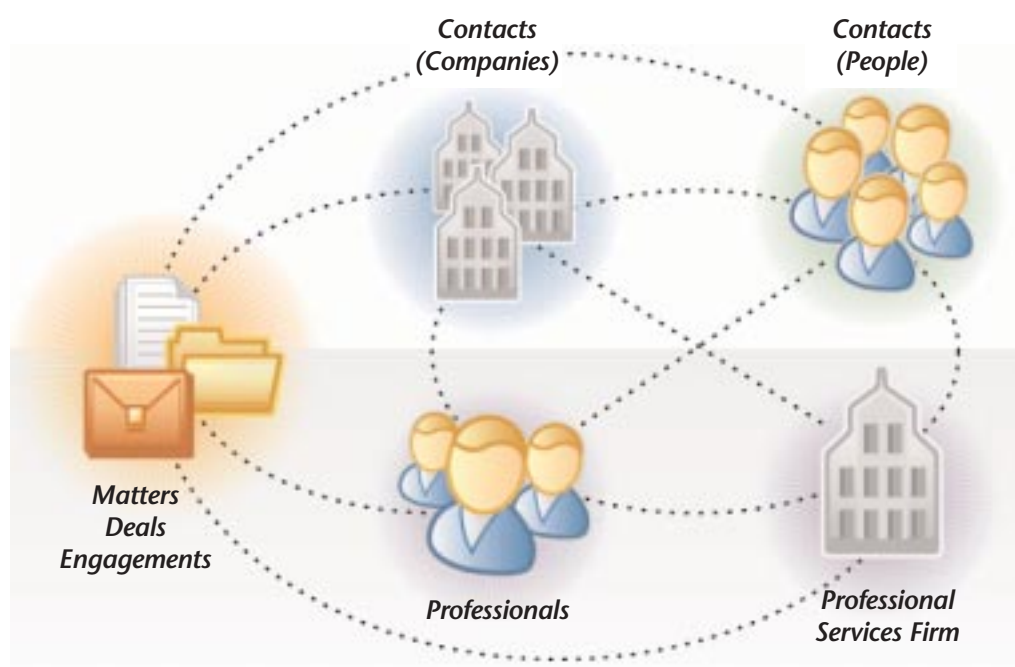
The skill and expertise that PSOs market to their clients represent the firm's "inventory" of services. As a firm expands, so does its skill-base, which ideally can then be leveraged to attract a wider variety of clients and cross-sell a richer complement of services.

Many PSOs have a difficult time keeping up with the firm's ever expanding and evolving capabilities, making it difficult to leverage the full range of their strengths. This challenge is most common as new professionals join the firm bringing new skills and expertise with them, or after a business combination such as a merger or acquisition, when a new group of professionals is added to the team.

InterAction's ability to provide visibility into client needs as well as firm capabilities facilitates effective cross selling and upselling. For example, one Interface Software customer manages its cross-selling initiative as follows: A core client service team is assembled based on who within the firm InterAction identifies as having the strongest relationships with the client. A complete profile of the client is then generated from the system that can include information such as the client's business, revenues, past billing history, services currently used, key players, influencers, decision makers, etc. A strategy session of the client service team will reveal what additional needs the client might have that the firm can accommodate. An additional query of InterAction uncovers who within the firm has the specific experience and expertise to comprise the appropriate services team and what other clients can serve as references for this

work. The team then has all the information it needs to pitch the client on these additional services.

Once the firm has won the engagement, InterAction then provides multiple levels of support to ensure the coordinated efforts of the team members serving a particular client. For instance, through InterAction® Projects™, an optional module, the system helps client account teams identify all relevant parties to an engagement and



InterAction® Projects™ reveals valuable Relationship Intelligence about transactions, matters, deals and engagements, as well as internal experience and expertise.

facilitate easy sharing of knowledge; users can quickly assemble distribution lists for easy communication between all relevant parties to an engagement; or execute a variety of queries regarding the engagement – such as a look up of the firm’s internal expertise and experience in order to properly staff the engagement.

The Relationship Intelligence provided by InterAction arms PSOs with information they need to identify additional business opportunities within the client base, and staff those engagements with the professionals most capable of producing the desired results.

Leveraging Relationships To Win New Business

As PSOs grow, their expanding network of relationships become a critical competitive advantage. But without immediate access to Relationship Intelligence – leveraging these resources effectively is nearly impossible.

For instance, in the most common scenario, a professional trying to win a new client will typically send out a mass e-mail to other firm members asking if anyone has a relationship with the prospect. If a response is given, the professional will then try to leverage that relationship to win the engagement.

In most instances, however, responses are few and far between for a number of reasons: These mass e-mails are viewed as nuisances and ignored; the recipient is not in the office at the time; the recipient is simply too busy to respond. Regardless of the reason, in most instances information about useful relationships are not revealed at the time they’re needed. And one of the firm’s most precious resources – who it knows – goes underutilized.

Through a variety of features, InterAction automates the process of revealing the strategic relationships that can help a firm win new business. For instance, InterAction’s Who Knows Whom™ feature automatically reveals who within the firm has a relationship with a particular contact. If no direct relationship exists,

*Who Knows Whom™
instantly reveals everyone
within the firm that has
a relationship with a
particular contact.*



InterAction’s Relationship Map™ feature will uncover intermediary contacts that might have a relationship with the a selected prospect – say another firm contact that used to work with the prospect, or someone who sits on the same charitable board with the prospect.

By revealing strategic relationships automatically and instantaneously, InterAction removes one of the most frustrating barriers a professional has to leveraging the firm’s internal network to win new business.

Eliminating Missed Opportunities

Missed opportunities count among the most costly consequences when a PSO does not have the proper Relationship Intelligence infrastructure in place. For example, in one instance a firm that is now an InterAction customer had been competing against

three other firms for a lucrative client engagement. Each firm was on equal footing relative to capabilities and cost. Ultimately the prospect decided to go with one of the firm's competitors.

A number of weeks later the lead professional who had been pursuing this prospect engagement had a chance conversation with a colleague at his firm who had not been involved in the prospect opportunity. The colleague revealed that his brother-in-law sat on the board of the prospect company. Had this relationship been known, the colleague could have leveraged his relationship on behalf of the firm, which could likely have resulted in a different outcome.



If no direct relationship exists, Relationship Map™ reveals other people known to the firm that might have a relationship with the contact in question.

In the professional services marketplace, personal relationships often make the difference between winning and losing. Through a variety of features such as Who Knows Whom, Relationship Map and others, InterAction helps eliminate missed opportunities by revealing the strategic relationships that can make the difference between success and failure.

Avoiding Embarrassing Losses

More so than in any other industry, the professional services sector is founded upon image, trust, competence and confidence. Mishaps and errors that might go unnoticed in the mainstream business world can have devastating effects in professional services.

The ways in which a firm can inadvertently alienate clients or prospective clients are numerous. Following are a few real-world examples:

- Consulting Firm A, with multiple offices throughout the United States is competing for a lucrative engagement. Unbeknownst to Firm A, one of its subsidiaries, Consulting Firm B, is also competing on the same engagement. Pitch sessions are coordinated and Firm A and Firm B are coincidentally scheduled back to back. It is only when professionals from Firm A and Firm B bump into each other at the prospect's offices that they realize they are competing for the same business. When the prospect learns that the firm is essentially competing against itself – the engagement is awarded to another firm. The prospect cited the firm's lack of knowledge of what its various offices were doing as the primary reason for choosing the competitor.
- Private Equity Firm C holds an annual conference at a luxurious five star venue to which high-stakes investors are invited to meet representatives from the firm's portfolio companies. Invitations must be sent out. Firm contacts are stored in a variety of locations, from individual contact managers, to portfolio

management systems to firm marketing databases. Compiling the invitation list entails manually integrating lists from these myriad systems, eliminating duplicates, and reconciling inconsistent data. The process is unnecessarily complex and prone to human error. When the invitation list is finally compiled, some of the firm's most prominent investors are inadvertently omitted. Invitations to several other investors were sent out with incorrect name and address information. These errors, in some cases, caused irreparable damage to client relationships.

- A law firm sends out notifications to clients advising them of changes in the tax laws. The firm inadvertently sent some letters to deceased clients. This puts the professionals in an extremely uncomfortable and embarrassing position, not to mention the pain and discomfort caused to the family members of the deceased clients.

In each of these examples, the PSOs inability to properly track and manage firm interactions with clients and prospects led to embarrassing mishaps that detrimentally impacted the firm's image and relationships.

InterAction provides a spectrum of client services automation and marketing functionality to ensure that every client interaction is a positive one.

By providing a centralized system from which PSOs can manage client services and marketing activities, InterAction drastically reduces the likelihood of these costly problems. Centralized list, event and campaign management simplifies

tracking and managing communications with contacts. A variety of data security and data quality mechanisms help ensure the data used to communicate with clients is accurate and reliable. And a 360-degree view of the relationship from the system ensures that all firm members have access to all relevant data prior to contacting clients.

Reducing Losses Associated with Turnover

When key professionals leave the firm – whether voluntarily or involuntarily, they take with them a vast resource of knowledge about people, companies, relationships, experience and expertise.

The absence of these professionals can cause a knowledge vacuum that can have myriad consequences, from lapses in service, to the loss of clients.



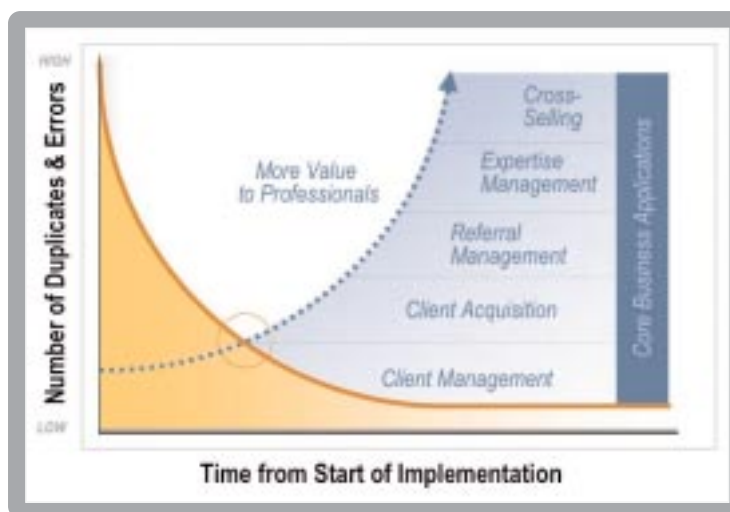
By providing a centralized knowledge base of Relationship Intelligence that survives the tenure of individual employees, InterAction helps eliminate the substantial risks associated with employee turnover, as one InterAction customer quickly learned

following the sudden, untimely death of one of its partners:

"You can't always predict every way in which you'll need a CRM system. One of our partners died recently. Amidst that tragedy we were fortunate that information about his clients was in InterAction. Not just contact information, but detailed activities, notes from conversations, information relating to work that was being planned. All of this was there after he wasn't. This allowed us to take appropriate action with those clients. This was just one more layer of proof that InterAction is essential to our practice."

Eliminating Inefficiencies Caused by Bad Data

PSOs are reliant upon the quality of their data in almost every facet of their operations. Indeed, the issue of data quality is emerging as one of the greatest challenges to confront the CRM industry. And the challenge is huge.



Data Value reduces the cost and effort associated with delivering high-quality, meaningful Relationship Intelligence to professionals.

According to Gartner Group's Beth Eisenfeld, customer data degrades at a rate of 2 percent per month, which translates to almost a quarter of the entire customer database annually. Inaccurate and low-quality data costs U.S. businesses \$611 billion each year in bad mailings and staff overhead alone, according to a recent report by The Data Warehousing Institute in Seattle. And, Gartner Group's recent study citing poor data quality as the biggest inhibitor to successful CRM implementation has brought the issue to the forefront.

Below are a few real-world examples of how poor data quality negatively impacts PSOs:

- **Damage to Firm Image and Client Confidence**

As noted earlier in this white paper, miscommunications with clients and prospects as a result of poor data quality can irreparably damage strategic relationships. When clients or prospects are inadvertently omitted from important firm events, when they receive duplicate copies of the same communication or when their contact information is incorrect, the relationship suffers.

- **Reduced Marketing Capacity**

Without a centralized system to manage contacts and ensure their accuracy, each marketing project is delayed in order to consolidate and cleanse the marketing list. This results in a lower overall capacity to engage in client development activities. One Interface Software customer describes its challenges prior to implementing InterAction: "It was horrendous. The professionals and secretaries had to confirm their mailing list for completeness and accuracy. These mailings were often restricted to a thousand pieces or less because of the huge efforts involved. Sometimes the process would tie up our mailroom, as well as a few secretaries, for days; defeating the contemporaneous aspects of the information." This customer reports that with InterAction, "now a single

secretary can send out mailings consisting of 3,000 emails and 2,500 faxes to targeted industries in a matter of 10 to 15 minutes."

- **Reduced Marketing Programs Impact**

Not only does poor data quality reduce a PSO's capacity to communicate with clients and prospects, it also reduces the impact of those efforts. Returned mailers, e-mail bounce backs and low event attendance are just a few of the consequences resulting from poor data quality. According to one customer, prior to InterAction, their return rate on external communications approached 20%. Since implementing the system the return rate is virtually non-existent, "With a mailing of over 5000 units, if we get a dozen back it would be a lot. The accuracy is almost 100%."

Most CRM providers do not address data quality in their products, instead leaving it up to their customers to institute processes to ensure the cleanliness of the CRM database. While those processes and rules are important, Interface Software has taken a leading position in the area of Data Value, which is defined as InterAction tools, processes and best practices that help ensure the success of the CRM implementation by reducing the cost and effort associated with delivering high-quality, meaningful Relationship Intelligence to professionals. (For more information on Interface Software's unique data quality functionality see Interface Software White Paper entitled "InterAction 5 Data Change Management")

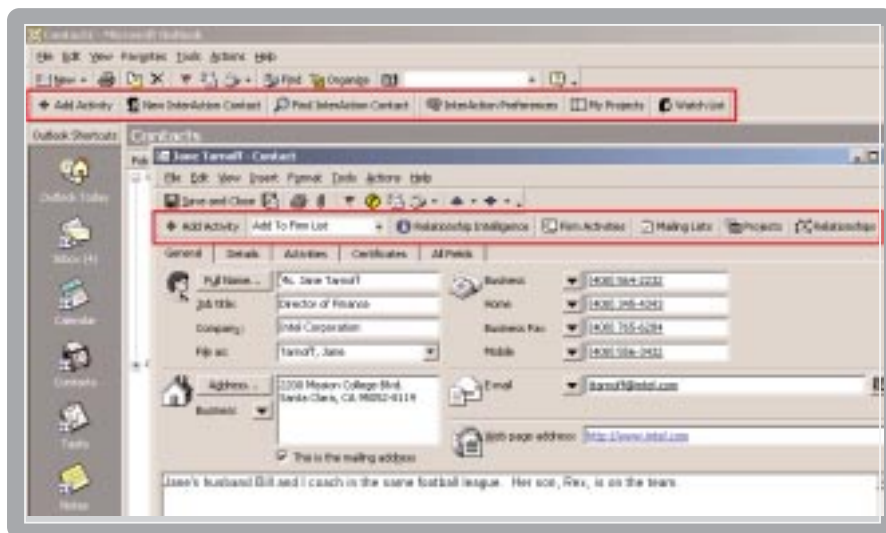
Beyond any other CRM solution on the market, InterAction does more to ensure a successful implementation by making it easier and more cost effective to maintain a clean and accurate database.

InterAction Works the Way Your Firm Works

A common concern amongst firms considering CRM is how InterAction will work within their existing IT environment. For example, some firms have already implemented a knowledge management portal or firm intranet, which is the primary system used

by professionals. Other PSOs have a "Web only" policy, by which they will only rollout Web-based technologies to their users. At other firms, Microsoft® Outlook®, Lotus Notes® or Novell® GroupWise® serve as the professionals' primary desktop applications and there is little desire to complicate their lives with a new CRM application.

Fortunately, InterAction was designed using the latest architecture and open standards. What this means is that InterAction can be integrated with



InterAction can be seamlessly integrated into corporate portals, intranets, Microsoft Outlook, Lotus Notes, Novell GroupWise or other enterprise applications.

your current IT system to minimize its disruption within your organization. If you do not want to roll out a new user interface to users, InterAction can be seamlessly integrated with the systems and user interfaces that you already use. As a result, professionals can enjoy the benefits of using InterAction – often times, without even knowing that they are using it.

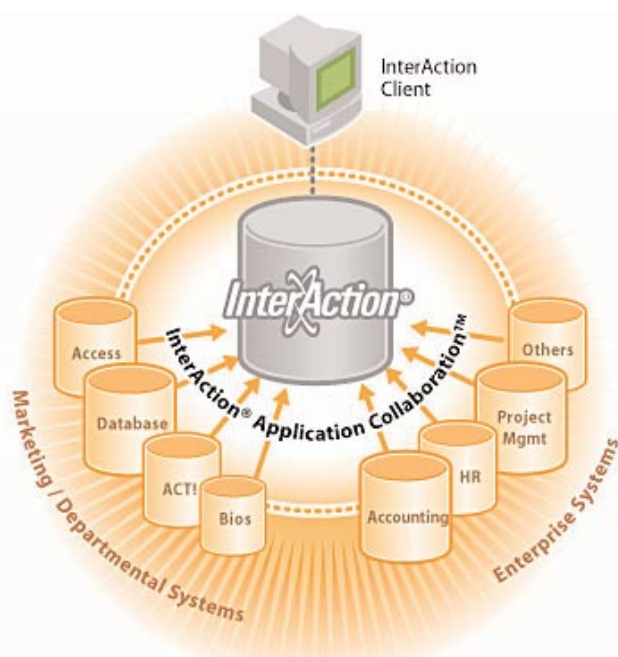
For example, the financial professionals at an investment banking customer prefer Outlook and were adverse to having to learn another user interface in connection with their CRM implementation. InterAction allows these users to remain in Outlook while at the same time contributing and accessing valuable Relationship Intelligence from the centralized database.

Get More Value From Your Existing Applications

Many PSOs already possess valuable data in their existing applications environment. Time and billing systems, financial packages, accounting software, human resources packages and portfolio management systems are just a few such applications. The problem is this data is often difficult if not impossible for the average professional

to access – and if they could, it would have little value because the information is not placed in any meaningful context.

For example, a PSO's accounting package might contain data on each client company, the transactions the firm worked on for that client and the amounts billed. The firm's HR package might contain information about the firm's professionals, their educational backgrounds and areas of expertise. But unless the professional knows where the data is and how to get it – it has little practical value. To illustrate this point, a firm might be attempting to win an engagement with a large prospect in the aerospace industry. In that context it would be helpful to know who within the firm has mergers and acquisitions experience with large aerospace companies with revenues over \$1 billion, and whether anyone who fits this description has any strategic relationships that can be leveraged with the prospect at hand.



Data from other applications can be seamlessly integrated into InterAction via Application Collaboration to provide a complete, 360-degree view of the client relationship.

and financial executives. InterAction overcomes this hurdle with an integration module called InterAction® Application Collaboration™, which allows PSOs to combine relevant data from virtually any application the firm uses, with InterAction data. Once aggregated and placed in context, this Relationship Intelligence becomes an easy to access and powerful income-generating knowledge asset that can be leveraged in a variety of business settings.

Most enterprise applications are not designed to provide desktop information access to end users like lawyers, accountants, consultants

Common Concerns About Implementing CRM Technology

While the benefits that InterAction provides PSOs are substantial, some firms are apprehensive about implementing a CRM solution. One common concern relates to the topic of data security and confidentiality.

Consultants, lawyers, accountants, financial and other professionals have fiduciary relationships with their clients and often work on highly sensitive, confidential engagements. Therefore a system like InterAction that promotes sharing of information can create a sense of discomfort with respect to certain contacts or engagements, or specific data relating to those clients or engagements.

For these reasons Interface Software has innovated some of the most sophisticated security mechanisms available to ensure that only information that can and should be shared, will be shared. For example, a professional may wish that the existence of a particular contact be kept completely confidential. InterAction accommodates this need by allowing private contacts to remain private, so that other members of the firm cannot access their information.

In the vast majority of instances, the concern is less about revealing the existence of the contact – and more focused on specific information about the contact. For instance, a consultant may not mind sharing a client's business contact information, but she does not want others in the firm to be able to access the client's home and cell phone numbers. Or, a professional has added notes to InterAction that contain highly sensitive financial information that should not be shared with anyone outside the project team working on a deal. Or the contact might be a public figure, and the professional does not want his colleagues to know that he has a relationship with the contact.

In each of these scenarios, there are only certain facets of information about the contact that are not appropriately shared with other firm members. In all of these scenarios InterAction, accommodates, allowing the professional to decide which information is appropriate to share with others, and to what extent. So, whether a professional wants to keep certain contacts completely private, share only portions of what he knows about a contact, or share all information freely – InterAction can accommodate all scenarios.

Another common concern about implementing CRM technology is the issue of whether professionals will accept the technology and use it. Most firms have experienced investing in a technology that ends up sitting on the desktop virtually unused by the people for whom it was purchased to help.

Indeed, one of the core differences between PSOs and traditional corporations is that mandating the use of technology by highly successful, busy professionals is very difficult. Interface Software is sensitive to these concerns and accordingly has invested enormous resources to ensure that professionals will want to use InterAction and that they will derive immediate value from it.

Our approach to delivering on this commitment is twofold. First, we designed InterAction to integrate seamlessly with how professionals already work, so that they do not have to significantly change their work habits in order to derive benefit from the system. For instance, if professionals prefer to interface with contacts via their contact managers – Microsoft Outlook, Lotus Notes, Novell GroupWise, or even personal information managers (PIM) such as Palm™ or BlackBerry™ – they can with InterAction. We have designed the system to work with whatever technology platform users prefer in order to ensure that InterAction will be practically transparent to them. Therefore there is virtually no learning curve associated with the system.

In addition, we understand that if professionals are inclined to try InterAction, they must derive immediate and valuable benefit from the experience, otherwise they will not use it again. Accordingly, we've designed the product and our best practices for deploying the system to ensure that InterAction delivers high-value, high-quality content to professionals immediately. Through a variety of methods, from automated processes to discover hidden relationships within data, to integration with other data sources – both internal and external, to recommendations on how to roll out InterAction most effectively within the organization – Interface Software has unparalleled experience in successfully rolling out CRM solutions within a PSO environment, and we share our knowledge with customers to ensure the highest possible acceptance rate.

Conclusion

Investing in a CRM solution can be one of the most important strategic decisions made by a firm to advance its client relationship management strategy. While CRM is now widely popular throughout the business community, not all companies are alike, and not all CRM solutions are alike.

Professional services organizations operate with a unique business model that is fundamentally different from that of traditional, products-based corporations. Interface Software's InterAction is the leading CRM solution tailored to address the unique needs of PSOs. InterAction strikes the delicate balance between delivering a wide range of benefits to professionals, marketing teams and the administrative staff that support them, while still accommodating the unique cultural requirements of PSOs for security and professional acceptance.

For more information about InterAction, please contact Interface Software as follows:

Interface Software
1420 Kensington Road
Suite 320
Oak Brook, IL 60523
888.472.1400
info@interfacesoftware.com
www.interfacesoftware.com