

Success Story: Gaines Kriner Elliott — Cross Border Services Rapidly Adds New Clients by Leveraging Athena’s Business Development Program



Client Profile

Gaines Kriner Elliott (GKE) is a CPA and full service accounting firm that offers audit, tax and specialty cross border tax services. They have 75 employees including five of which represent the specialized Cross Border Tax team.

Business Situation

The Gaines Kriner Elliott (GKE) Cross Border team wanted to expand their service to chartered accountants (CAs) in the Ontario area. Because of the constant tax law and regulatory changes, Federal and State Laws present a challenging learning curve to any firm or chartered accountant. Most chartered accountants are not able to develop and sustain a high degree of US/Canadian tax specialization.

It was important for GKE to successfully connect with the chartered accountants. However, GKE’s specialized team faced a challenge in finding an effective way to reach out to the chartered accountant market and form an initial introduction to their services.

Furthermore, they lacked a marketing process and the internal resources to research and find a list of highly targeted and qualified chartered accountants in the Ontario area.

As a result of the above predicament, it was imperative for the GKE team to find a solution that was in line with their goals and marketing plan.



GKE was able to form new business relationships with Chartered Accountants in a short period of time by utilizing Athena’s successful approach. Additionally, their marketing professionals helped put us on the map as leaders in Cross Border Tax solutions.”

– Tax Manager

Athena’s Services Fill Resource Gap

Gaines Kriner Elliott (GKE) partnered with Athena SWC, a business improvement consulting firm, to leverage their synchronized Relationship Acquisition and Management Process (RAMP), marketing support services, and web-based technology tools. GKE selected Athena because of their expertise and proven

process model of targeting, developing, and managing business-to-business (B2B) sales opportunities and relationships in service environments.

Additionally, Athena provided consultative support services for GKE’s specialized Cross Border Tax services.

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Getting Started

An essential first step was to formulate a successful way to approach CAs and their firms in the Ontario area. Athena's custom-built list process required Athena to understand, profile and prioritize the most viable market contacts to produce a highly targeted and qualified list of CAs. The company's methodology of synchronous flow (multiple marketing medium touches) was critical in creating the appropriate education and awareness regarding GKE's offer to the Canadian CA market.

Using RAMP, highly focused messaging was developed in the form of direct mail and email pieces. In addition, Athena's highly trained marketing associates made follow-up calls to the CAs. Athena's marketing support services provided a continuous execution of nurture and touch activities that were designed to develop relationships with targeted CAs, create awareness of GKE's services, and drive each lead to next step dispositions.

The customized process educated the Canadian market regarding the value of GKE's specialized Cross Border Tax services.

Furthermore, Athena's monthly Sales Pipeline Management Services provided expertise, resources and software tools to track, manage and support existing sales opportunities. This allowed GKE to move new business relationships through an active sales cycle with ease and efficiency.

Athena's marketing resource and support role also served as an extension to the Cross Border Group by developing collateral for handouts and ensuring current and prospective CAs were up-to-date with latest U.S./Canadian tax compliance. They were able to do this using their e-newsletter program, which provided education and awareness in the CA market. This in turn led GKE to build and retain strong customer relationships, while focusing on their daily accounting responsibilities.

Additionally, Athena's ability to gather industry specific intelligence through a detailed discussion, provided GKE with a strong understanding of the Chartered Accountants' needs for Cross Border Tax services. This prepared GKE's Cross Border team to effectively respond to any client tax issues or concerns.

The Results

**Added
30**

**new CA
relationships**

**Delivered
Qualified
Leads**

**leading to Canadian
market expansion**

**Increased
Market
Awareness**

**in Canada, leading to
new business**

Athena successfully scheduled 45 conference calls, in which 50% resulted in face-to-face meetings. As a result of Athena's process, GKE secured 30 new chartered accountant relationships. In addition, Athena delivered a highly qualified list of chartered accountants that have resulted in an expansion into the Canadian Market in a short time frame.