

2025 Buyer's Guide

What to Look for in High-ROI Relationship Tech

In 2025 and beyond, firms that rely on relationships to grow can no longer afford to treat CRM and marketing automation as static databases or siloed tools. The most successful organizations are using these systems to **actively uncover insights, strengthen connections, and deliver more timely, personalized client experiences**, all while maximizing the return on their technology investments.

This checklist highlights the essential features your firm needs across three critical layers of your tech stack:

- **Foundational marketing automation** to engage clients and prospects at scale
- **Core CRM capabilities** to capture and manage firm-wide relationships
- **Automated data and relationship intelligence** to ensure your data stays accurate, complete, and actionable

Use this guide to evaluate your current systems, identify gaps, and prioritize upgrades that will help your firm stay competitive and relationship-driven in the year ahead.

Foundational Marketing Automation Features

These tools help deliver consistent, relevant outreach to clients and prospects at scale:

- Campaign management for email, events, and thought leadership.
- Automated workflows to nurture contacts based on behavior and engagement.
- Landing pages and forms that capture interest seamlessly.
- Segmentation and scoring to prioritize the right audiences for the right initiatives.

Is your current system equipped to:

- ☐ Create and manage multi-channel campaigns?
- ☐ Automate contact nurturing based on behavioral triggers?
- ☐ Easily deploy and integrate landing pages/forms?
- ☐ Score and segment contacts to drive personalized engagement?

Core CRM Capabilities

Your CRM should function as a reliable, firm-wide record of relationships and engagement – not just a static database:

- Centralized contact and organization profiles, accessible across the firm.
- Visibility into client and matter pipelines, including progress tracking.
- Customizable reporting and dashboards tailored to practice groups, sectors, or geographies.
- Tight integration with everyday tools like email, calendar, and mobile devices to reduce friction.

Is your current CRM able to:

- ☐ Provide a unified, accessible view of contact and client records?
- ☐ Track business development efforts and pipeline activity in real time?
- ☐ Generate role-specific dashboards and reports?
- ☐ Seamlessly integrate with email, calendar, and mobile apps?

The Non-Negotiable Third Layer: Automated Data & Relationship Intelligence

This is the critical, and often overlooked, layer that ensures the data underpinning your systems is trustworthy, current, and actionable:

- Automated capture of emails, meetings, and other touchpoints so nothing is missed and no one has to manually log activity.
- Relationship mapping to uncover connections across the firm, revealing warm introductions and strengthening internal collaboration.
- Continuous data enrichment to keep contact details accurate and highlight meaningful changes, such as role transitions or declining engagement, before they become risks.

Does your tech stack include tools that can:

- ☐ Automatically capture and log relationship activity across platforms?
- ☐ Map connections between contacts, clients, and colleagues?
- ☐ Enrich and update contact information without manual effort?
- ☐ Detect signals like engagement drops or job changes?

Bonus: Integration Considerations

The value of your tech stack multiplies when tools work together. Look for vendors that offer pre-built integrations with your CRM, email, and calendar tools.

Introhive integrates with Salesforce, Microsoft Dynamics 365, HubSpot, and more – automating data capture and surfacing real-time relationship intelligence where your teams already work.