

A B2B Success Story – PKF O’Connor Davies

Innovation can be achieved through collaborative customer interactions, working toward a beneficial outcome for all parties involved. It is this organic exchange of ideas that leads to a profitable and continuous trade of goods, services, and referrals. Here is what we learned when working with the accounting and consultancy firm of PKF O’Connor Davies.

Our hope is to illuminate customers and business owners with our strategy, following what is indeed a very true but universal notion – that two heads are always better than one.

THE KEY PLAYERS

Founded in 1891, PKF has nine locations across the Northeast, and each one sends print marketing products to their clients that include magnets, calendars, and branded holiday greeting cards.

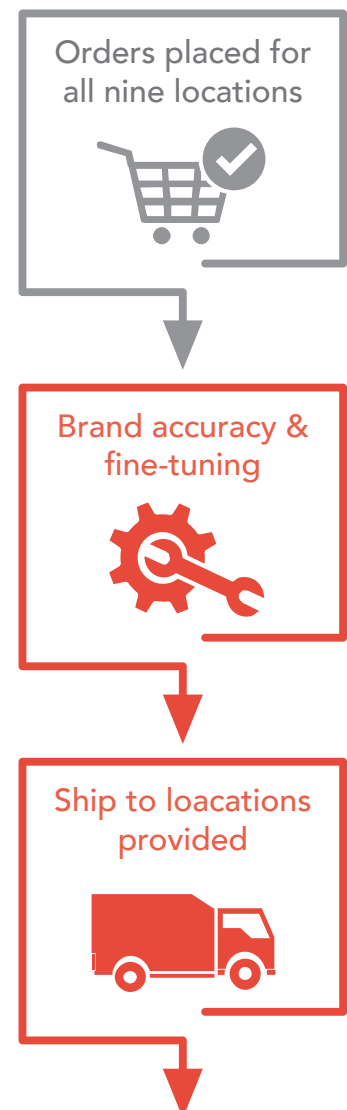
PKF O’Connor Davies has many branches with various clients and several requests per year – orders can get complicated real quick. Therefore, a collaborative system was necessary to ensure a successful and ongoing relationship.

THE FACILITATORS

John Lefler is the account manager for CardsDirect who also does custom design work for many of their high-profile clients. When Lefler spoke with Toni Giannelli, Administrative Assistant for PKF O’Connor Davies, they needed a way to ensure fast delivery, brand accuracy, and efficient distribution on all custom print products to each of PKF’s nine NE locations.

THE IDEA

Giannelli would place the orders for all nine locations on one account, Lefler would ensure brand accuracy with every custom print product (fine-tuning to the specifications of the client), and CardsDirect would ship them to the locations provided. Simple but effective.



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THE OPERATION

With this system in place, the operation has run consistently since 2014. Giannelli places the orders on behalf of all PKF O'Connor Davies NE branches then Lefler and his team craft, fill, and ship them. The gears of the process work smoothly, the desired result is achieved, and the relationship continues as it's designed to do.

THE SUCCESS

CardsDirect and PKF's valuable exchange has run concurrently without problems for several yearly orders. They maintain a mutually beneficial working relationship through shared responsibility and direct communication to produce continuous results.