

MKTG 4
Educating Your Attorneys
On Business Development, Marketing And CRM Value

Keys to Successful CRM Training Programs



Marketing Technology
Peer Group



Keys to Successful CRM Training Programs

1. Acknowledge that CRM is an on-going education project.
2. Ensure trainer(s) have a good rapport with Marketing and understand the Marketing Department's CRM goals.
3. Ensure trainer(s) understand the Business Development/Client Services goals associated with using CRM (for each user group).
4. Understand the workflow process for all user groups being trained on CRM.
5. Ensure trainer(s) have a thorough understanding of the various components of CRM (Outlook integration, Web client, Word integration) and how they support individual user group goals.
6. Determine what pieces of the application the various user groups should use on a daily basis. (Attorneys – CRM through Outlook, Secretaries & Legal Assistants – combination of Outlook and Web. Application use will change depending on how long the product has been used, where users are with regard to the resolve process (InterAction), and in conjunction with review settings.)
7. Develop a detailed Instructor Guide or script that explains and emphasizes key points for each user group.
8. Identify user groups or practice groups with specific initiatives where CRM will be the tool to report and measure results.
9. Create scenario based training programs that answer not only answer “What’s in it for me?” but also demonstrate how easy it is to incorporate CRM into participants’ daily routine.
10. Create targeted workshops and/or continuing education sessions around end-user/practice group initiatives.
11. Integrate CRM w/Word templates and macros. Add appropriate merge templates to the web client (custom labels, etc.).

12. Identify appropriate resources (trainer and/or marketing coordinator) to follow-up with users after training – if new roll-out or re-introduction, ensure contacts are getting resolved in a timely fashion, confirm proxy rights are in place, verify default settings, etc.
13. Offer follow-up desk side training to attorneys (ask targeted questions about day-to-day contact management and demonstrate results with an example using CRM).
14. While you'll never have a completely pristine db, ensure that top clients and commonly accessed contacts are accurate and up to date.
15. Ensure that the Data Quality managers have DQ priorities and data processing strategies.
16. Develop a realistic roll-out strategy. Identify champions and initiative based practice groups and roll-out to them first.
17. Determine intake and training process for new hires (particularly lateral attorneys with existing contacts).
18. Schedule desk side follow-up visit w/new hires.
19. Use DCM tickets as an opportunity for continuing education.
20. Develop an internal CRM User Group and conduct regular meetings.