MKTG 4

Educating Your Attorneys On Business Development, Marketing And CRM Value

It's All About Who Knows Whom

Marketing Technology
Peer Group

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::It's All About Who Knows Whom

Marketing in law firms is all about relationships. Our product is people; smart people with expert knowledge, but it is the connections they make and the relationships they build that bring valuable business opportunities to the firm. After all, a former law school study-buddy may one day become the General Counsel of SuperBigCompany. At the heart of many marketing endeavors is the important question: Who knows whom?

In order to efficiently answer the critical "who knows whom" question, concerted effort must be made to maximize usage of a CRM system. InterAction (IA) is one system that can be customized to meet the needs of internal consumers so that any attorney, secretary, legal assistant, manager or marketing team member can extract valuable relationship intelligence and business development opportunities quickly and easily. To best accomplish this, IT and marketing must work together to design and implement an ongoing training schedule for secretaries, legal assistants, marketing, IT, and of course, lawyers.

Make IA a part of your users' daily routine. With a little creativity, you can take IA usage to a higher level, far beyond the mailings and events tracking that is typical. A firm could base its internal business development newsletter in IA, practice group leaders could run reports on past and upcoming activities and the visibility efforts of individual lawyers. With the matters and opportunities modules, a true picture of sales in your law firm can be achieved. Nixon Peabody LLP's Chief Marketing Officer Mark Greene says, "Continually adding layers of information that is immediately useful to attorneys is the key to success." Here is how to tame the relationship beast.

Secretaries and Assistants Are Key

How do you keep thousands and thousands of shared contacts up to date? We all know that people change jobs frequently, and while the marketing department works diligently, it cannot be expected to research, update and correct every single contact for every lawyer in the firm. Instead, the legal secretary, who in many cases knows the clients and prospects personally, needs to be motivated to take each lawyer's contacts under his or her wing. Based on my experience in three different law firms, it is often the case that the secretary feels invested in supporting the legal practice but not the business development practice. I believe that a cultural change in the secretaries' mindset to one of "account management" will benefit the secretaries, their lawyers and, ultimately, the entire firm.

Faith in the System

Ongoing data clean-up provides the baseline for faith in the system. If marketing can be in a position to alert attorneys to title changes and job moves of friends and acquaintances, it means we are pushing timely and valuable relationship information to those who can act on it with immediate payoff. Users become encouraged and excited by the growing amount of accurate and useful information available. At any given moment, we can accurately identify who knows whom. "Do we know anyone at Acme Widgets Inc.?" "Yes, we've done some real estate matters for them, and our new lawyer from the IRS knows their chief lobbyist." "Ms. Brown, *Legal Times* has it today that your client at MNOP Corp. has moved to a new job." When sending news like this to the lawyer, copy the secretary who can make the change, and coordinate a congratulatory note from Ms. Brown to the client. Now we're getting somewhere!

Turn Up the Volume

In order to increase usage and capitalize on this investment in time and software, the marketing department and IT should work together on a training and outreach program to reinforce the value of the CRM system to the firm's attorneys and staff. Essential to the process is a training and implementation consultant who can bring the latest best practices to the firm. Deborah Holt, a consultant with whom I've worked, says, "The success or failure of a firm's business development efforts lies in its relationships. CRM applications, like InterAction, highlight the 'enterprise' view of the contacts in the database, which extends far beyond an individual or departmental view. This cultural evolution is one of the most difficult obstacles firms face when implementing a CRM tool. Job one is to develop an appropriate end user-driven methodology that appeals to all groups and ensures key decision makers will enthusiastically use and endorse the technology. CRM is rapidly becoming an integral part of how law firms practice law; cultural change and user adoption must follow."

Brag Sheet

In my first month inside a law firm, I was assigned one of law firm marketing's most dreaded tasks: the in-house newsletter. I looked over a draft PageMaker design and pondered the pain of interviewing lawyers, making countless rounds of edits and navigating the politics of whose case to feature on the front page.

Then, I was struck by an idea. Why recreate activities that should already appear in the CRM database? A printed, designed newsletter didn't seem to make sense when our audience's most valuable daily read is BNA's Daily Report for Executives, an e-mail newsletter consisting of merely headlines and links. We could save a tree by mimicking BNA's style using IA. This solution also addresses the age-old argument that an in-house business development newsletter is dangerous because rivals or rogue reporters could obtain confidential information with a simple "forward" or a printed copy rescued from the trash. An internal business development newsletter based in InterAction could look like this:

Smith Schools Universities and Colleges in the ABCs of ERISA:
http://www.interaction.article.

Users can click on the link if they want the full story and a list of other panelists and attendees at this conference presentation. If you're not an employee of the firm, sorry, you can't get to it.

Here's another example:

Anderson Agitates Prospect in Corn Country, Tees Up Labor and Employment Issues: http://www.interaction.article.

Now, if you're a user of this firm's CRM system and share my twisted sense of pun, you can conclude without clicking that Anderson has paid a call on Whirlpool Co., headquartered in Newton, Iowa, but outsiders cannot. System users may click through and discover whom Anderson pitched, the specific issues discussed and her planned follow-up activities. An in-house newsletter could consist mainly of a string of headlines and links including client and prospect visits, articles and press mentions, speeches and one juicy article attachment with marketing or business development tips and ideas. Lots of positive feedback from readers is sure to follow!

What Comes Next?

IA can also be used to keep a record of initial business development calls and opportunities and to provide reminders for follow-up calls, much like the process I employed as an advertising sales representative for the publication *Legal Times*. One of the challenges in selling ad space to law firms is that the sales cycle is quite long by advertising industry standards. Many times I would phone or visit a prospective buyer only to be told, "We're not there yet, give us six months." I would faithfully note this pledge to call in my sales database. Six months later, I would print out my weekly call sheet, and there would be my scheduled follow-up. It would have been ludicrous for me try to memorize these promised return calls, but that is exactly what many lawyers attempt to do.

A CRM system can and should play this role for lawyers. If a lawyer has a notion that her new client might need [xyz] services but feels the relationship is too young to plant the seed, she can note it in IA and give it a future contact date. Some firms have even implemented the "reminder" capability that syncs with Outlook's calendar. In a perfect world, every lawyer would print out "this week's business development calls" and get a list of possibilities from months ago. There is no need to commit these little brainstorms to memory when the software can do the work instead.

Compensation Is the Carrot

Compensation is a sensitive issue in most law firms. With the best of intentions, firms spend countless hours filling flip charts with ideas and equations to arrive at a fair and equitable compensation formula. Many firms have moved toward transparency, and that is a good thing. But individual lawyers often struggle at comp time with recreating their visibility and business development activities from pages and pages of nonbillable time notations. A well-designed CRM system can solve that problem.

InterAction could provide attorneys with a "how do I look?" report on a quarterly basis. In IA, this is simply a listing of activities from the previous quarter with types of activities totaled up as a summary:

Speeches/Presentations	5
New Matters	12
New Clients	3
Articles	2
Client Visits	7

When it comes time for attorneys to write their end-of-year compensation memo, they've got data. Adding activities to the database also provides a rich record of the various ways we've touched the client or prospect. Attorneys across the firm look smart when they can say to a prospect, "So you heard Smith's speech on green affordable housing tax credits. Is this an issue you are still grappling with?" This is certainly preferable to, "Oh, I didn't know your company attended the conference this year."

Referrals Rock

For firms without satellite offices scattered across the globe, referrals to and from other law firms worldwide are a key source of business. Using CRM as a tracking mechanism makes this process more effective and efficient. Need a lawyer in Brazil? Find referral sources in two clicks. Have a case you'd like to refer to a firm friend? Search the referral database by practice area and scratch a back that will someday scratch your back in return. Recording referral activity is an important part of business development for law firms.

When New Lawyers Arrive in Who-Ville

When laterals arrive, loads of valuable new "whos" can be added to the system. One way to encourage early CRM usage and to quickly integrate new lawyers is to run a report of "who knows whom" on their own contacts to find where colleagues and friends overlap. This is the low-hanging fruit you sought when you recruited and hired this powerhouse. Gather it while it's ripe.

Training Never Ends

Don't insult lawyers by showing them how to enter a new contact from a business card. Their time is far too precious. Convince attorneys in 30-minute, one-on-one sessions that IA can become a valuable part of their day-to-day routine. Make sessions manageable, digestible and tailored to each attorney's work style. Show them how to find out who knows whom in three clicks, and you are on the right track. If a lawyer is going to Chicago to present a paper, she should instinctively know to ask for a "who knows whom" report on firm clients in the Chicago metro area well before leaving for the airport. The travel can be leveraged into additional client and prospect visits with consideration and ease.

Secretaries and other administrative staff should receive a two-hour group beginner session followed by advanced classes and topic-specific workshops on an ongoing basis. IT and marketing should work closely (and perhaps with a consultant) to develop user-specific, targeted training sessions that appeal to each group's needs. Each group session should include a brief introduction to the firm's business development goals. IT can also team with data stewards to build a solid reputation in the firm as approachable and reliable resources for answers and new ideas for IA. Quarterly continuing education seminars for secretaries and one-on-one sessions for new lawyers should remain top priorities.

It's Worth the Work

Your firm can reap significant, positive results from your investment in CRM. Information can flow freely throughout the firm, across practice areas and departments. Associates and staff can add value by being more aware of business development activities and thus have greater opportunity to contribute. This investment in CRM takes a lot of work, and it requires buy-in at the highest level. In a business built on relationships, we cannot afford to be ignorant of whom we know.

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