



Replacing “Low-Cost” CRM with InterAction Invigorates Firm’s Business Development

PULLING THE PLUG ON A MORIBUND CRM

A director of business development and marketing recently joined a mid-size, Canada-based law firm. Her first order of business in her new job was to evaluate the firm’s existing customer relationship management (CRM) system. It didn’t take her long to discover that the CRM was not meeting the needs of the firm.

Although the user-configurable CRM system was purchased originally as a low-cost option, the firm had eventually invested \$500,000 over the course of five years just to get the software working. Adding to her chagrin, she discovered that only one of the firm’s lawyers was using the system. After evaluating the system’s capabilities, she concluded that the system was incapable of supporting her business development goals.

Having evaluated the InterAction® customer relationship management software solution at her previous job, she decided to replace the firm’s virtually lifeless CRM with InterAction - a robust relationship intelligence tool.

She based her decision to implement InterAction on a number of factors. These included its reputation as the market leader in CRM for the legal industry, the fact that InterAction is intuitive, clear, and easy to use, and her observation that InterAction is very efficient. “It costs a firm less when you can work efficiently,” she says.

SMALL FIRMS BENEFIT FROM THE EXPERIENCE OF LARGER FIRMS USING INTERACTION

She states that one of its most appealing selling points is that the solution is in use at so many major international law firms. As a result, she says, “InterAction is being updated on a regular basis and our firm will benefit from this progress.”

Although a modestly sized firm, its business development team exceeds expectations, thanks to the reliable, up-to-date client contact data and relationship intelligence that InterAction provides.

“What’s great about InterAction is that since all the major international firms are using the solution, InterAction is being updated on a regular basis and our firm will benefit from this progress.”

TRAINING IS KEY TO SUCCESSFUL CRM IMPLEMENTATION

The director's advice for other mid-size firms implementing CRM is to focus on training. She recommends working with lawyers one-on-one to educate them on the importance of sharing their contacts. Once lawyers understand how doing so supports the firm's business development efforts as well as their own interests, they go from not wanting to share, to "wanting to be a part of something." She relates how pleased the firm's lawyers were when they discovered that they could locate, track, and connect with clients at a heavily attended firm event thanks to the integration of InterAction and Vuture.

EXPERIENCED OVERSIGHT HELPS ENSURE DATA QUALITY

The firm's director also emphasizes the importance of having a competent administrator to oversee the implementation and day-to-day operations of the system. She relies on the expertise of the firm's CRM coordinator. With more than 15 years of experience administering CRMs and an in-depth familiarity with InterAction, their coordinator plays a vital role in ensuring the quality of the data.

The firm has made it mandatory for its 100+ attorneys and assistants to use the InterAction for Microsoft® Outlook® (IMO) interface. The

coordinator gave attorneys and assistants 30 days to clean contacts and then loaded shared contacts into the InterAction database. She was also responsible for training the lawyers to use the system.

After six months of continued data synchronization under her direction, the firm now has clean, up-to-date information on 10,000 companies and 25,000 contacts in its InterAction database and several targeted marketing lists.

Client Snapshot

A MID-SIZE CANADIAN LAW FIRM

CUSTOMER PROFILE:

Headquartered in Montreal, this firm is a leader in real estate law with recognized strengths in all areas of business law and litigation. This firm has extensive experience serving companies of all sizes.

BUSINESS SITUATION:

Struggling with an ineffective CRM implementation, the firm's new director of business development and marketing realized the firm needed CRM capabilities similar to larger international firms to ensure the firm's continued success. After implementing InterAction, the firm now has a high attorney adoption rate and clean, up-to-date information on 10,000 companies and 25,000 contacts in its InterAction database, as well as more targeted marketing lists.

SOLUTION:

- InterAction
- InterAction for Microsoft Outlook (IMO)

BENEFITS:

- Makes it easy to share business development activities in the system
- Enables effective cross-selling
- Helps marketing programs be more effective thanks to clean data
- Integrates with Vuture, enabling lawyers to locate and connect with clients at busy events
- Increases attendance at firm events (while inviting fewer guests) with targeted lists

CLEAN DATA IS A BOON FOR EVENT PLANNING AND FOLLOW-UP

The firm holds two major marketing events each year: a conference and an evening client event. As a result of implementing InterAction and the better-targeted list it enables, this firm is now inviting fewer people, yet increasing the number of event attendees. The reporting capabilities in InterAction facilitate proper follow-up, allowing lawyers to reach out to their contacts with RSVP reminders or enthusiasm about getting together at the event.

“You need the right target list to make marketing work. If data is clean, your marketing programs will be more effective. Our marketing programs are now more effective thanks to InterAction.”

LOOKING AHEAD

Having spent four months cleaning and synchronizing data and getting staff up to speed on InterAction, the firm’s CRM team is looking forward to rolling out specialized business development training for the lawyers. Guided by these dedicated professionals and armed with an even greater understanding of how InterAction fuels the business development engine with relationship intelligence, their lawyers – and the contact data they share – will help accelerate business development at the law firm.

[Learn more about InterAction customer relationship management software.](#)
[Call us at 800-419-5590 or visit InterAction.com](#)

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About InterAction

InterAction® (interaction.com) is the leading provider of CRM software and services, which enable professional services firms and other relationship-based organizations to create the relationship intelligence they need to uncover new business opportunities.

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