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CRM Solution Creates Business Development Opportunity

By Paul S. Grabowski

Porter & Hedges is one of the last remaining mid-sized firms in Houston with 100 attorneys that regularly vies for business with much larger multi-office firms. To level the playing field as smoothly as possible, the firm embarked on a plan to improve its business development infrastructure. By shoring up technology, marketing and customer relationship management (“CRM”) foundations, Porter & Hedges would be more competitive in business development and competitive intelligence.

The first year of the quest was taken up with in-depth research, evaluation and analysis to exhaust possibilities and CRM solutions. Prospective consultants were charged with implementing a solid business development program, along with a new, first-time CRM solution that would elevate how the firm tapped the treasure trove of clients internally.

CRM SELECTION CRITERIA

With the support of firm leadership, marketing and IT together were required to critically and clearly understand how internal customers would use a CRM solution. Pre-purchase factors included discussions surrounding interface, ease of navigation, long-term utilization, scalability, and intuitive adoption. Other issues weighed heavily on the final decision:

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- The solution needed to seamlessly integrate with other software and database applications already in place.
- The process for data input had to be simple and intuitive.
- A synchronized interface between Outlook, Elite and the CRM solution was required.
- Reports, modules and streamlined workflow were necessary and scalable.
- The CRM solution had to grow with the firm, offer endless possibilities and contribute to ROI.

After a thorough investigation, Porter & Hedges made a strategic decision in the fall of 2007 to deploy LexisNexis® InterAction® software.

RAMP UP

IT and marketing played a critical role in their compatibility and cohesiveness leading up to the first data dump. Every law firm investing in installing and deploying a sophisticated solution like InterAction must ensure these two teams are in synch. At Porter & Hedges, the IT department is the bona fide expert in InterAction; they know the system better than anyone firm wide, and marketing relies on them for their earned knowledge.

In advance of the first data deployment, marketing and IT can expect to devote a significant period of time for a minimum of two weeks preparing for launch. This effort can encompass anything from hardware and software synch, installation, communication, training, assigning roles and responsibilities, and more. Because the teams were congruent, we were able to keep the pace to an even keel and collaborate on everything needing completion. We relied heavily on the LexisNexis software consultants and our hired consultant to guide us on the “what next” of the process.

The premise behind marketing is to find the right software that works with the firm’s personality and culture. The CRM system apple must pair with the attorney apples. Then, the issue becomes how best to implement the system in an efficient and expedient fashion. That process includes the early identification of attorneys’ concerns about data confidentiality and relationship ownership. One way to mitigate the potential issues is to ensure that senior leadership is on board with strong support of the CRM solution.

DATA DUMP

“Dirty” data living in Outlook business contacts needed to be cleansed prior to populating InterAction. A joint team of six from marketing and IT cohesively and meticulously combed every record prior to the first data dump into InterAction. Each entry was reviewed, mapped, cleansed, categorized, de-duped, and deleted if too old. Attorneys helped on the front end to tag entries as confidential, personal or open. This process, while labor intensive, is necessary at the outset to ensure the cleanest percentage of overall data. Data were gleaned from elsewhere in the firm’s files, such as spreadsheets used for previous firm-sponsored events.

While preparing for installation of the CRM solution, the firm was also in the process of developing a business continuity plan. Data and server security, and hard drive and workstation back-up planning were being initiated in the event that business continuity was disrupted (such as during Hurricane Ike in the fall of 2008). The teams dovetailed on both timelines to enhance business infrastructure and perfect technology for future data security.

TRAINING

Since deployment in late 2007, there are nearly 60,000 company name entries in InterAction along with hundreds of thousands of personal contacts. The data are continually cleaned. Marketing and IT are confident the database functions at a high percentage clean-data capacity; however, it is a continuous cycle to keep entries accurate.

Firm-wide training began with a core team trained in all aspects of InterAction. The core team trained second-tier trainers within the firm during Friday "lunch 'n learns." The trainers were then responsible for conducting desk-side trainings and posting weekly tips on the firm's Intranet.

Display ads were hung on bathroom doors asking "Is Your Data Clean?" Secretaries attended a series of training sessions, and weekly sessions remain available for those who never attended before or need a refresher. Beginning in 2009, all new associates are required to attend mandatory training, and their use of the CRM system is also part of their indoctrination into the firm.

In May 2008, a mass invitation was mailed to the firm's mailing list of 7,600, and just over 10% were returned undeliverable. As more mailings occur and more data are mined for errors, the firm expects fewer undelivered pieces. A recent CLE announcement mailed in early 2009 garnered a 90% accuracy rating.

SOME BENEFITS

Here is a summary of some of the benefits Porter & Hedges gained by using InterAction.

- InterAction is integrated with the firm's Elite accounting system. When someone pulls up a contact, they can source from where the business originated. The standard rule is for a prospecting attorney to inform the originating attorney of any pending or new activity to mitigate conflicts during the business development process.
- Prior to implementation of CRM, there were approximately five firm-wide e-mails daily seeking updates on prospects or clients. Since implementing InterAction, that frequency has dropped to less than two per week.
- Although staff continues to learn

the benefits of InterAction, there are many examples of how the CRM solution has saved time on a weekly basis. One typical exercise included generating 52 copies of mailing lists for every partner to manually update and determine who should receive the firm's communications. Today, InterAction manages this project efficiently, with no paper and little time.

- For the 2008 holiday season, Porter & Hedges adopted a creative idea from the LexisNexis library — rather than mailing printed holiday greetings, the firm created an electronic holiday card. The firm took the money it would have spent on holiday costs and donated 84% of it to the Greater Houston Hurricane Ike Relief Fund.

Some practice areas within the firm are realizing the fruits of labor and reaping benefit from InterAction.

- As a direct result of InterAction, the firm has enhanced its events sponsorship. Porter & Hedges now hosts bi-yearly construction programs and women's initiatives in addition to several client-specific CLE programs. The firm is more involved in speaker sponsorships and also participates in other sponsorships because it's easier to coordinate and track.
- Prior to implementing InterAction, Porter & Hedges had no outbound mailings or communications with prospects or practice group clients. Recently, 110 people attended a breakfast seminar for the construction practice that secured qualified business leads as a result of more highly accurate invitation lists developed on InterAction.
- Firm wide, there are 20 newly created marketing lists for various events; prior to InterAction, there were no functional lists anywhere in the firm. The construction group now depends on outbound mailings, including a quarterly newsletter, to promote its business. There are 13 working lists in regular use by the construction practice.

As social media continues to be prevalent in law firm marketing and business development, Porter & Hedges will consider turning on LinkedIn® via InterAction. Users can conveniently ac-

cess LinkedIn profiles from within the InterAction application window. When a contact in our database is accessed, that person's LinkedIn profile pops up with scores of his or her contacts from respective LinkedIn networks. This multiple-tier connectivity presents thought-provoking business- and client-development opportunities firm wide.

The scalability of InterAction is truly a feature worth mention. IT departments know their users and companies can grow into the features and modules InterAction brings. For firms still on the cusp of purchasing CRM software, the recently announced InterAction onDemand Software as a Service ("SaaS") is the first first Web-accessible CRM solution for mid-market law firms. This SaaS offering streamlines a leading global CRM solution into a lower- cost, more-simplified application for firms with fewer than 250 attorneys.

As they say, the proof is in the pudding. Looking back over the past several years when our firm's business development technology infrastructure had very little in place to today when the value of InterAction is becoming more defined, Porter & Hedges is on its way to realizing ROI beyond earlier comprehension. We strive to share our results with firm leadership that include better productivity, work efficiency, relationship management, enhanced business development and lead generation.

There's one thing for sure, the investment we have made in InterAction has put us on a path to capitalize on a wealth of existing information, and it is key to Porter & Hedges' overall business development strategy.

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