



Using LexisNexis® InterAction® to Pull, Not Push, Engineering Firm's Prospects

Featuring Bob Glassen, Corporate Director of Business Development, Morrison-Maierle

Morrison-Maierle is owned by its more than 400 employees and is Montana's oldest and largest full-service civil engineering firm. It is widely recognized for excellence and leadership in support of sustainable growth in the region. The firm's commitment to quality solutions and exceptional client service has grown from the culture initiated in 1945 by the company's founders. Morrison-Maierle offers a broad range of engineering, planning, surveying and scientific capabilities throughout the western United States from 10 offices in Arizona, Utah, Wyoming and Montana.

Situation

As Corporate Director of Business Development, a position he obtained in 2007, Bob Glassen is responsible for empowering Morrison-Maierle's business development effort and helping the firm reach its goals of an additional \$10 million in revenue and 500 employees. The firm's executive leadership is committed to this aggressive growth plan during uncertain economic times. By moving the needle beyond the current growth plateau, Morrison-Maierle can strengthen its competitiveness and prepare for the future.

As one of the most respected leaders in engineering consulting, Morrison-Maierle has a documented track record of high growth and profitability. Because the firm's engineers both sell business and complete technical work, this "seller-doer" model is conducive to growing business from a solid referral network.

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For business development to succeed, Bob needed to move the firm beyond highly effective and comfortable referrals to a lead-generating system with measurable tracking. Bob's previous experience with CRM provided the context for it becoming a viable solution at Morrison-Maierle. By leveraging engineers' professional contacts, a CRM system could help streamline connectivity, enhance productivity, track activity surrounding leads, and serve as a depository for information in one accessible location.

Selecting a Solution

Morrison-Maierle's highly qualified IT department provided a wealth of expertise that Bob immediately tapped. They worked cohesively to select a CRM system that would help the firm plan, organize, execute and measure the business development process.

The goals for the CRM solution were to:

- Leverage existing lead generation with more measurable business development.
- Enable more efficiency during the “pull” of reaching potential clients, rather than the “push” of a conventional sales process (considered a negative at Morrison-Maierle).
- Streamline communications among the firm's 10 offices in four states.
- Promote outreach to untapped leads and increase contact with potential and current clients.

Step one in the selection process was a search engine review to identify “professional services and CRM.” The synergies between engineering firms and law firms with their practice-centered business structure and business development processes pointed Morrison-Maierle toward LexisNexis InterAction as a possible software solution. During the pre-selection review process, Morrison-Maierle's board of directors and executive leadership gave InterAction high marks for its customer support, interface, elegance, and sophistication.

InterAction was implemented in February 2008 to a beta group of 15 professional staff who were actively engaged in business development. These people immediately saw the

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benefits of using the software and became its “champions.” Training was provided in-house through the firm’s “Morrison-Maierle University” program.

In addition to using InterAction to measure the business development process, the firm reorganized into Market Groups to better manage their overhead time. Market Group Leader positions were created to champion business development at all levels of the firm and to encourage utilization and monitor progress of LexisNexis InterAction.

Return on Investment

If an engineering firm adds \$10 million annually from business development activities, it’s reasonable to expect the efficiencies provided by InterAction will enhance this by a minimum of 5 percent or \$500,000. That improvement alone will more than pay for the investment in InterAction in less than one year.

Roll Out

InterAction was rolled out in 2008 over five monthly flights:

- **Month One:**
10 users, two admin, four corporate-level users
- **Month Two:**
30 users and five admin
- **Month Three:**
All client service managers and market group leaders; all remaining corporate-level employees.
- **Month Four:**
Installation of InterAction Opportunities Module.
- **Month Five:**
Installation of InterAction Engagements Module.

The biggest thrust is expected in January 2009 when market group leaders are charged with a goal of 100 percent utilization of InterAction among the firm’s nearly 200 users. The projected spike in usage will help streamline tracking and measurement; increase numbers of calls to prospects/clients; improve overall business development activity and the business wins record.

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