

**BALLARD SPAHR  
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Committed to excellence in the practice of law, Philadelphia-based Ballard Spahr Andrews & Ingersoll, LLP is one of the 100 largest and most profitable law firms in the nation, indicated by its inclusion in the recently published *AmLaw 100*, with over 500 lawyers and ten offices located throughout the mid-Atlantic corridor and the western United States.

Ballard's vision was always to put mission critical data about clients and prospects in the hands of the lawyers to support their business development initiatives and enhance client service. But while the vision was sound, the firm's first attempt to execute was flawed.

In the fall of 2001, Ballard had purchased the InterAction® client relationship management (CRM) solution, which at the time was developed by Interface Software. The plan was to use InterAction as a centralized client/contact database and eventually integrate data from other critical firm information systems, such as the time and billing and human resources applications.

Unfortunately, the project didn't go as planned. The firm's InterAction implementation team hadn't adequately built out the necessary infrastructure or implementation plan, nor had they effectively communicated the system's benefits to firm leaders. Ultimately, with anemic buy-in and uptake among lawyers and secretaries, users did not contribute data to the system, saw little value in the content, and ultimately rejected it outright. As a result, usage of the product remained isolated within the marketing department.

### **Content-Enabled Client Development Tools**

After the firm's first attempt to implement InterAction failed, a new approach was needed. Blain Banick hired in October, 2004 as Ballard's new chief marketing officer had significant experience launching CRM initiatives. He understood the planning that must be invested in the logistics of the rollout and selling it to the lawyers.

"If you put a CRM system on the lawyer's desktop and expect them to have to do most of the upfront work – contributing contacts, adding activities – and not get any benefit from the system until later on in the implementation, it won't work," explained Banick. "If attorneys don't see the value of the system right away, they won't get involved. And that's exactly what happened during the initial rollout of InterAction at Ballard."

When Banick joined Ballard Spahr in 2004, he knew that CRM was absolutely critical to the firm's future, and that InterAction represented state-of-the-art CRM technology. But he also believed that for a new implementation to succeed at Ballard, mission critical client data had to be in the system and available for use, without requiring any attorney effort. "I have held the belief for quite some time that CRM must be 'content-enabled'. The only challenge was, content-enabled CRM didn't yet exist in the legal industry."

Around that time, Interface Software was acquired by LexisNexis®. While some firms questioned why a global leader in news and business content would want to acquire InterAction, Ballard immediately understood the synergies. "I knew that this would be a very good thing. If you could leverage LexisNexis' rich content and make it available on a real-time basis to our lawyers through InterAction, I was confident we could create the critical information hub that we needed to support our future business development efforts," said Banick.

Indeed, upon further investigation, Banick learned that content-enabled CRM would be one of the deliverables resulting from LexisNexis' transition to its Total Practice Solutions strategy. Under that strategy, LexisNexis established an entire solutions line exclusively to develop and market client development solutions geared towards helping firms grow revenues.

Among the new business development tools being developed for the client development solutions line was

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LexisNexis® atVantage™, a business development tool that would allow marketers to identify and target new opportunities by providing a comprehensive view of clients, prospects, competitors and industries. atVantage addressed an industry-wide need for a single, comprehensive resource to identify new market trends and expansion opportunities, cross-selling opportunities and to keep track of the competition.

The other tool being developed in conjunction with atVantage was the Corporate Intelligence Subscription™ for InterAction. This content offering populates and updates InterAction with key company profile information sourced by LexisNexis, such as corporate revenues, SIC/NAICS codes, ticker symbols and number of employees, to name a few.

Given InterAction's tight PIM integration, this new content offering would mean that directly from Microsoft® Outlook® or Lotus Notes® lawyers would have access to combined internal InterAction content and external LexisNexis data. Moreover, lawyers would also have the ability to "link out" to atVantage directly from Outlook for more detailed company information including a firm's litigation and transaction history, a comprehensive corporate profile as well as a collection of news, business, financial and personnel information about their clients and prospects.

Because this the data from Corporate Intelligence Subscription is loaded automatically into InterAction and updated regularly, lawyers would not need to contribute or otherwise do anything in order to immediately access meaningful information from the system. "These products were very clear evidence to me that LexisNexis was listening to its customers about the products we need to support our growth strategies," said Banick. He immediately signed up to become a beta customer for the Corporate Intelligence Subscription.

### Building Momentum

So as not to repeat the mistakes of the past, Ballard undertook a multi-prong strategy for rolling out the Corporate Intelligence Subscription for InterAction to firm lawyers. First, Ballard private-labeled the content-enabled CRM initiative under the name of BizConnect to avoid any confusion with the firm's earlier InterAction rollout. BizConnect was part of a larger group of business development tools implemented at the firm including BizBuilder (an online collateral tool for assembling customized, client specific collateral pieces) and BizIntake (an online conflict checking and file opening tool). The "Biz" suite of products were designed to support the entire business development cycle from client identification and prospecting to business development pitch, and the payoff of new business in the door.

Second, Banick conducted an internal grass-roots communications program to raise awareness of the InterAction data that would be available to lawyers. He started by providing

briefings to Ballard's leadership and giving them demonstrations of the new system's capabilities. "This was an enormously important step to ensure top-level buy in to our initiative."

Third, Banick first rolled out InterAction and the Corporate Intelligence Subscription to the firm's thought leaders from within specific practice areas. The lawyers from the pilot group were enthusiastic, open to new technology and wanted improved methods for business development.

For this group Banick offered very focused 30-minute training sessions using real life scenarios to demonstrate how a content-enabled InterAction would help them provide better client service and uncover new business opportunities. Banick knew that once he was able to win over these lawyers, they would help spread the word to other attorneys. The Ballard team also focused closely on the secretaries, providing in-depth training on the new product and demonstrating specifically how it could be used to save time in their day to day activities. "We truly did want build a coalition of the willing."

Key to building this coalition was an understanding what the lawyers needed from a content-enabled CRM system and ensuring InterAction's benefits were well understood and immediately available. Phil Korb, a senior Ballard real estate partner and co-leader of the firm's technology committee, was clear about what it would take to earn his buy-in to the initiative. "My first obligation is to provide the best legal representation to our clients. But my job also includes preserving and expanding our relationships and business with our existing clients, and finding and bringing in new clients," said Korb.

Korb said he needed a tool that would help him demonstrate to his clients that he is listening, understands their business and remembers what they are about. "That means that when I'm talking to a client I want to be able to access, instantly, my notes from our last conversation, and what I accomplished since then. I also want at my fingertips information about the past matters we've worked on for them. Or background details about the client's company, like who's who in their senior management, and the latest news about them and their industry."

Korb also cautioned that any content-enabled CRM solution would have to be intuitive and extremely easy to use. "I can't go running around looking for client data," said Korb. "You know how quick and easy it is to read an email message or look up a contact in Outlook? That's how quick and easy my client development tool has to be. Otherwise I won't use it."

To ensure that Ballard's content-enabled InterAction implementation succeeded, Banick also had to build his coalition with IT, with whom he would have to partner very closely in order for his ambitious plans to be realized. Kim Wismer, Ballard's chief technology officer, had her own concerns regarding any new implementation. "When we invest in new technology platforms, I need to have confidence that the products are built on stable and secure platforms," Wismer

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explained. They must integrate well with other systems we run. And the solution provider must provide outstanding support. If any of these factors are missing, the implementation stands a strong chance of failing, which I want to avoid at all costs."

Given the challenges Ballard had with its first InterAction implementation, user acceptance and uptake were also strongly on Wismer's mind. "I have to have a strong level of confidence that the intended user of a technology product will actually use it. Does the product address a particular strategic need of the firm? Is it designed with the user's workflow in mind? Can it deliver measurable value with minimal learning curve?"

### Promoting Success

The content enabled version of InterAction is now fully implemented at Ballard and the early feedback from attorneys and staff is extremely positive, "I honestly can say the implementation surpassed every expectation. This is the first on budget, on time technology implementation that's delivered what it's promised."

The Ballard team was quick to promote the early successes throughout the firm. Once lawyers and staff saw the initial successes their colleagues were having, they would be much more open to adopting and using this new technology.

Indeed, some of InterAction's most vocal skeptics have now become its most ardent supporters. Banick recalled hearing from one senior attorney who had received an urgent, Friday-afternoon call from a client regarding his matter. "This particular attorney was able to tap into the system to get a thoughtful set of solutions for that client because the information was right at his fingertips. He could refer to past activities, newsletters he had received. He was ecstatic about this. It resulted in a significant new piece of business and InterAction was one of the big reasons why we secured this success."

Korb is equally impressed with his experiences thus far. "LexisNexis has built a client development tool that makes it easy to access Relationship Intelligence right from Outlook," Korb said. "Before I talk to a possible new client, or catch up with an existing client, I make it a point to do some instant research by checking InterAction. This makes it much easier both to identify business development opportunities and to serve my clients better."

The IT team is likewise encouraged by the success of content-enabled CRM at Ballard. "I am thrilled that our lawyers have taken so quickly to InterAction and the new Corporate Intelligence Subscription offering," said Wismer. "I am always impressed when a technology provider can take a very sophisticated offering and make it so easy and accessible to lawyers."

Banick likewise reports that his marketing and business development groups are also garnering significant value from the successful implementation. "We now have the capabilities to do everything from manage marketing programs and events, to mine relationships and track and manage critical information about our clients and prospects," Banick explained. "These capabilities are exactly what we need to help us grow revenues within the existing client base and win new clients."

Measuring ROI on CRM implementations is never a simple proposition. But Banick has started implementing several processes that he believes will ultimately quantify the value the firm is enjoying from a content-enabled InterAction. First, they are tracking attorney usage of the system – how many times lawyers are accessing Relationship Intelligence from the system and how many times they go back. Second, the firm is utilizing InterAction data to support business development initiatives and to inform client strategy groups. The hope is that marketing will be able to measure increases in new business wins with the aid of the enhanced intelligence InterAction provides.

Finally, Banick is tracking the number of information requests to marketing that come in from lawyers to determine if InterAction is freeing up resources. Banick's team is seeing results. "We've already experienced a fifty percent decline in information requests from lawyers, and we're looking for a greater decline as word of InterAction's capabilities spreads," said Banick. "Lawyers have become more self reliant, productive and effective from a client service and business development perspective. And this has freed up my staff to focus their efforts on other strategic initiatives."