PORTER & HEDGES LLP

[Business is personal.

How CRM Drives Marketing Ramp Up From Zero to 60 mph in a Year

Featuring Paul Grabowski, Director of Marketing, Porter & Hedges LLP

When Paul Grabowski arrived at Porter & Hedges in 2005 to take the post of director of marketing, he joined the last mid-sized firm in Houston with 100 attorneys. Its peer group consists of solo practitioners and corporate counselors to the largest law firms. Porter & Hedges clients span start-ups to multi-national corporations across practice areas.

Prior to Paul's arrival at the firm, marketing solutions and business development tools were in need of revision. His role was to elevate the firm's competitiveness by shoring up its foundation in branding, internet marketing, customer relationship management (CRM) and business intelligence.

The main premise that drives Porter & Hedges' marketing philosophy is to "do it better, stronger and faster." They compete regularly with The Am Law 100®, and to do that on a level playing field, Paul's role has been to assist in streamlining the firm's technical backbone as it relates to marketing and business development. In doing so, attorneys would have the tools they need to be competitive in business development and intelligence.

In a highly strategic approach, Paul spent approximately eight months researching and evaluating various business development consultants, to determine how best to develop the firm's infrastructure to implement a solid business development program. In parallel, he spent six months evaluating various CRM solutions to ensure the technology solution matched the personality of the firm.

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>
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Paul dug deeper to understand how his internal customers would use a system and what interface would be appropriate for ease of navigation and utilization. To Paul, these factors weighed heavily on the final purchase decision. He wanted:

- *A system that would seamlessly integrate with other software and database applications the firm already had in place.*
- *The new solution to allow for easy data population.*
- *A synchronized interface between Microsoft® Outlook®, Elite and the CRM solution.*
- *An expandable solution not just for the here and now, but for five years down the road and beyond.*

Paul was able to parlay previous research with current research into a strategic decision to order InterAction® software in the fall of 2007.

Implementing InterAction

Previously, Porter & Hedges had kept all such contact information for events in Microsoft® Excel® spreadsheets for future use. This helped in the initial "data dump" into InterAction. Additionally, the attorneys helped on the front end to tag entries as confidential, personal, or open. The "dirty" data coming from Outlook needed to be cleansed prior to integrating into InterAction. This process, while labor intensive, was intended to boost the percentage of clean data overall.

The team of six from marketing and IT meticulously combed entries prior to the data dump doing relationship mapping, cleaning, categorization, de-dupes and deleting aged information. This process dovetailed quite well with the business continuity plan that was simultaneously being developed in the event the firm's operations were disrupted.

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Ramping Up

Of the 250 employees at Porter & Hedges, the attorneys have the InterAction Windows® client, and the secretaries utilize the InterAction Web client interface.

To prepare the staff for CRM, train-the-trainers sessions were held within the firm to take their expertise into Friday lunch 'n learns, desk-side trainings and onto the Intranet with weekly tips. Display ads were posted on bathroom doors saying "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.

An unexpected synergy of InterAction is its correlation with VoIP which the firm is in the process of implementing. Users will have the ability to dial phone numbers from InterAction records from their computers.

In nearly a year, there are close to 8,000 company name entries in InterAction along with thousands of personal contacts and the data is continually cleaned. In May 2008, a mass invite was mailed to the firm's mailing list of 7,600 and 963 were returned undeliverable. As more mailings occur and more data is mined for errors, the firm will see fewer undelivered mail. A recent CLE announcement already posted a 90 percent accuracy rating. Originators of the data are then asked to provide accurate information. As time goes by, Paul is confident the database will be 90 percent clean from the inside out with a continual need to update entries from the outside in.

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Some Benefits

Currently, practice areas within the firm are capitalizing on the new marketing infrastructure built by Paul and his team, driven with help from InterAction.

- *Prior to implementation of CRM, there were about five company-wide e-mails daily seeking updates on prospects or clients. Since implementing InterAction, that frequency has died down to almost zero. Now, e-mails that are sent asking for such information are prefaced by "I have already checked InterAction…"*
- *There are currently some seven CLE courses, mailings, events and business development programs planned at the firm. Prior to implementing InterAction access, Porter & Hedges had almost no outbound mailings or communications with prospects or practice group clients for years and the delivery of such information was difficult at best.*
- *InterAction is integrated with the firm's Elite accounting system. When someone pulls up a contact, they can see the source where the business came from. The standard rule is for a prospecting attorney to inform the originating attorney of any pending/new activity to ensure no conflicts during the business development process.*
- *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. Now the InterAction program manages this project efficiently and with little time.*
- *As for holiday mailings, Paul is adopting a creative idea from the LexisNexis® library—rather than mailing holiday greetings, Porter & Hedges will e-mail intended recipients and ask for their selection of a charity from a provided list. A percentage of expense to produce annual holiday cards will be donated to the charities of choice with input from Porter & Hedges clients and prospects.*

"When you look back several years ago and there was nothing in place at the firm to aid and abet business development and then you see the speed with which we're coming alive in this arena due to InterAction, the results are impressive," said Paul Grabowski. "The ROI continues to evolve in a short year, and I'm confident we'll soon develop data to confirm higher productivity, greater work efficiency and reduction in administrative time to accomplish more with clicks of a mouse."