



Selecting InterAction® is Like Turning on a Light

When the light bulb turned on, it glowed brightly at SmithAmundsen LLC, a 100+ attorney firm headquartered in Chicago. Prior to its implementation of a CRM solution in 2006 after making a purchase decision in late 2005, the firm was using ACT, which they felt or believed to be a cumbersome and giant database.

No one could track business development activities; marketing assistants could only use an Outlook® calendar for upcoming events month by month; and when three attorneys targeted the same prospect, the switch activated.

As a firm consisting of younger partners and older-guard senior partners, SmithAmundsen runs a balancing act to encourage adoption of technology solutions to influence productivity. A new CIO position has been in place a year, and technology solutions are continually explored to enhance workflow.

The decision to implement CRM was reached to help strengthen the firm's collaboration and culture and enhance its reputation in the legal industry. After eight methodical months, featuring a tiered roll-out that began with the firm's core executive committee, the whole firm was on board.

Sara Goddard is the business development & marketing manager for SmithAmundsen. Her role is to encourage the firm's utilization of InterAction® software and introduce new efficiencies being realized with its use.

Getting the firm to adopt CRM was a gradual progression. With an older executive committee their concern, and biggest misconception, was the sharing of contacts. There were fears of "poaching" and attorneys at large needed assurance senior management would, in fact, add their contacts to the database, too. Other issues involved collegial competitiveness among the firm's attorneys.

To overcome these perceptions and foster a more collaborative culture, Sara developed a series of guidelines to help people get beyond their fear of change that technology inevitably brings:

Concern: As a litigation firm, the courts are moving to e-submissions and e-filing.

Solution: Attorneys were shown how InterAction could streamline processes in e-submissions into document systems and management.

Concern: Attorneys were concerned about confidentiality of records. What they also voiced was fear a disgruntled attorney would sabotage entire profiles of data meticulously entered.

Solution: The attorneys use the InterAction Web Client, and to prove confidentiality, the marketing team demonstrated how the Data Change Management Inbox ensures changes to records are only made with proper authorization.

Concern: People were concerned about accessibility to data and private information.

Solution: Sara showed them the locking feature that protects an e-mail address or private telephone number.

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– Sara Goddard, Business Development & Marketing Manager,
SmithAmundsen LLC

These simple show-and-tell solutions helped alleviate tension throughout the firm and furthered the adoption and use of InterAction. It also put the onus on the marketing team as trustworthy keepers of the data.

Once attorneys began to use InterAction, the next hurdle was getting them to like it.

Sara looks for anecdotes throughout the firm of attorneys who have had particularly good results from using InterAction beyond the basics. One senior-level equity partner, with limited technology knowledge, was working late one night and needed information on a prospective client. By searching InterAction, she found another attorney's name and contacted him directly for assistance in her fact-finding process.

When the attorneys learn they are able to save time, enhance productivity, generate more qualified leads for business development and avoid the previously popular emails "does anyone know someone at XYZ company?" they become an ambassador of InterAction.

At SmithAmundsen, those benefiting most from InterAction software are the associates. While not required to bring in new business, each must begin developing their brand early.

One advantage for new attorneys joining the firm is a near-immediate ramp up to using InterAction in the first week of employment. A marketing team member imports the associates' contacts into the CRM solution before they start working.

Associates learn early the benefits of working with InterAction. Marketing encourages associates to delve deeper into profiles and record more detail. Favorite restaurants, sports teams and names of family members or birthdays are considered standard for a prospect's profile. This in-depth information broadens the business development outreach by making legal assistants smarter, too. They know where to make a reservation and at what date to send a birthday card.

"InterAction has helped SmithAmundsen enhance productivity and eliminate wasteful time," said Sara. "It also fosters collaboration among attorneys to more powerfully implement business development. As we grow with the solution, we are certain to realize more return on our investment."

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