

CASE STUDY | GREENBERG GLUSKER

Embracing CRM Technology to Drive Business Growth Through Client Relationship Data and Insights



KEY FACTS

Based in

L.A., California

Multi-practice law firm with

100+ attorneys

Based in Los Angeles, California, Greenberg Glusker is a successful multi-practice law firm with over 100 attorneys with a reach that spans the entire United States and the globe.

While Greenberg Glusker is known for its leading entertainment law practice, the firm also has several successful practice areas such as their corporate, real estate, and litigation groups. To promote its capabilities outside of entertainment law, become more competitive, and increase its business, the firm needed a new strategy to expand its brand awareness.

Upon joining the firm in 2019, Director of Marketing Sheenika Gandhi realized that to drive business growth, the firm needed to increase the use of its customer relationship management (CRM) system to leverage client relationship insights and target clients with specific marketing efforts while building brand recognition.

To achieve these goals:

The Greenberg Glusker marketing team worked with the LexisNexis[®] Professional Services team to understand the extensive capability of the firm's LexisNexis[®] InterAction[®] CRM system to maximize its potential value.

The team utilized both InterAction IQ and the integration with email marketing software, Concep, to automate data collection and augment relationship intelligence.

They partnered with the InterAction Data Quality Services team to assist with their day-to-day data stewarding needs, special data quality projects, and routine audits.

Challenges

Targeting key clients, referral sources, and markets effectively

Without the ability to target key clients, referral sources, and markets with the right content that would generate interest and establish credibility, Greenberg Glusker couldn't reach the audience they desired.

Leveraging strong relationships to bring in new business

Because of poor data quality, contact data at Greenberg Glusker was missing information, out of date, and there were duplicate contacts—all of which hindered marketing effectiveness.

Maintaining high-quality CRM data

At the firm, attorneys, secretaries, and marketing staff did not have standard processes to update contact data, enter details when a new contact was opened, or log other pertinent client relationship information.

Solutions

Restructure the CRM back-end to align with the firm's business development strategy

To target the firm's marketing efforts more efficiently, Greenberg Glusker performed a top-to-bottom evaluation of the firm's InterAction database. During this process, the following system changes were made:

- Old mailing lists and contact types were archived or deleted
- Contacts with no existing attorney relationships were purged
- Contact Types, Marketing Lists (with Sponsorship), and Activity Types were reorganized and renamed to match the firm's current business development activities
- The Data Change Management inbox was eased so assistants would feel empowered to make updates without having to wait for a data steward to approve a change

Several processes were also improved, including:

- Sending bounce-back reports to the Data Quality Services team to research and update outdated contacts
- Assigning the responsibility to enter new client information to assistants as soon as they completed a new client intake form.

Engage InterAction IQ to simplify and automate data collection and maintenance

By engaging InterAction IQ, Greenberg Glusker could passively update contact information using email signatures, as well as fill in any gaps in contact records. InterAction IQ also identified relationships and engagement strength to help uncover business development possibilities and help identify where to target marketing efforts.

Utilize InterAction Data Quality Services

Sheenika said, "The InterAction Data Quality Services team is an extension of our team, and [they] saved us a lot of time with data stewardship services, processing data updates, and reviewing email bounce-backs, which helps ensure the quality of our contact data. For us, it is a very cost-effective and reliable option."

Fully understand the features, functions, and capabilities of InterAction

Greenberg Glusker had used InterAction as the firm's CRM system for over 20 years. To fully understand how InterAction could help improve business processes and drive business growth, Sheenika trained with the Professional Services team to become an InterAction power user. Having an in-depth knowledge of InterAction allowed her to speak in detail about the capabilities and benefits of InterAction, building trust from attorneys and other prospective users in the firm. She also met with her Client Advisor every month with a set agenda focused on improving the quality of the data and higher level of engagement from the attorneys and assistants.

Build trust to engage all InterAction users

To improve user adoption throughout the firm, Sheenika developed strong personal relationships so she could build trust and illustrate the value InterAction offered based on an individual's needs. She held frequent meetings with both attorneys and assistants to show how integrating InterAction into the firm's business development processes made their lives easier. She met attorneys where they were at in terms of their comfort levels.

Even though the firm "outlawed" spreadsheets (specifically during e-holiday card season) so that their data remained in one system, attorneys could always lean on the marketing team to do a bulk upload, sync contacts to the database, or train on how to use the system.

Attorneys were also trained to use InterAction's working lists to easily track their most important contacts and refer these to targeted lists to help them deepen relationships.

Results

The improvements in data quality, lawyer engagement, and business development processes made it possible to successfully execute Greenberg Glusker's business development strategy to expand brand recognition as a full-service firm.

The marketing team can now track important business development metrics, such as event attendees and business development meetings and activities (via submitted expense reimbursements), to help better understand the ROI from events, sponsorships, pitches, and RFPs.

Greenberg Glusker uncovered new business opportunities with established connections between automated email campaign activities and relationships that gauge interest and measure relationship strength.

The firm improved market reach with better marketing lists for its thought leadership and events. Lists are clean and accurate, and lawyers can add a contact to a list by simply clicking a link, ensuring all key contacts are included in relevant communications and events.

Now, lawyers have the deeper insights they need to enhance the client experience during meetings, and it's easy to update contact records with new relationship intelligence. Seeing this value has increased lawyer engagement; for example, one senior partner agreed to sync their contacts after several years of declining, to construct an invitation list for a webinar.

Past client relationships that weren't maintained have been revived through improved visibility of relationship strength. As a result of a clean and actionable alumni database, a successful alumni event was held at the end of 2019 and attorneys were thrilled to engage with former colleagues who had moved to in-house roles and other strong referral sources.

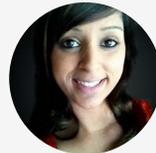
About Greenberg Glusker

Greenberg Glusker is a successful multi-practice law firm with over 100 attorneys with a reach that spans the entire United States and the globe. Greenberg Glusker's structure and business strategy allow them to meet their clients' needs in a competitive and cost-efficient manner, with first-tier legal services, in-depth industry knowledge, and fewer client conflicts than in a multi-office, national firm.



Sheenika Gandhi
Director of Marketing, Greenberg Glusker

Sheenika Gandhi is the director of marketing at Greenberg Glusker, where she leads the development and implementation of the firm's marketing and business development, diversity and inclusion, and corporate social responsibility initiatives. She can be reached at sgandhi@ggfirm.com.



Purnima Gupta
Digital Marketing Coordinator, Greenberg Glusker

Purnima Gupta is the digital marketing coordinator at Greenberg Glusker, where she is responsible for managing the firm's website, social media, email marketing and CRM database. She can be reached at pgupta@ggfirm.com.

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