



# InterAction Implementation Delivers Relationship Intelligence for Am Law 50 Firm

## A SIZEABLE ADOPTION CHALLENGE

When a new CRM supervisor joined a nationally recognized Am Law 50 firm in 2012, she faced a formidable challenge. The new head of CRM was tasked with applying her expertise to breathe new life into an InterAction implementation that had been in place since 2000.

The firm has approximately 1,000 lawyers and more than 10 offices spread across the United States, Europe and Asia. Upon assessing the firm's CRM health, the newly hired supervisor discovered that while the majority of the firm's lawyers in Europe had adopted InterAction, the situation was not as optimistic in the United States. According to her, the adoption rate among the firm's US-based lawyers was well below that of their European counterparts.

## FIRST STEP: EDUCATION

Her first step in addressing domestic attorney adoption rates was to establish a process for educating partners and attorneys about the benefits of InterAction. To facilitate the education process, the CRM supervisor enlisted the help of the firm's secretaries. She instituted mandatory training for the administrative assistants to enable them to support her in her efforts. Those efforts included communicating to the firm's lawyers how InterAction could help them better manage their contacts and also share their contacts into the InterAction CRM solution.

After the initial training course, the firm developed and offered a "Working Smarter" course covering more advanced topics.

## SECURITY GUIDE EASES WORRIES

One of the other barriers to CRM adoption was that some of the firm's lawyers were concerned about the confidentiality and security of their contacts. In one case, an attorney had 8,000 contacts, many of which held highly influential positions in government. She explained to the attorney that InterAction users have the ability to specify which pieces of contact information are shared across the firm, allowing them to configure their security settings to share a contact's office phone number, but not the contact's mobile phone number, for instance.

## A 5-STEP PLAN FOR SUCCESS

The training program was just the first step of several that comprised the comprehensive revitalization program for InterAction at the firm.

### 1 Training

The firm took a novel approach to the mandatory training by tying the ability to pass a test on InterAction knowledge into each individual's performance plan. Incentivizing proficiency in this way was instrumental in getting the administrative staff up to speed on InterAction quickly.

### 2 Secretarial Council

Another key to the InterAction revitalization process was the establishment of an InterAction Secretarial Council, a group of power users dispersed geographically across the firm's offices. Comprised of secretaries who developed the skills necessary to assist with data cleanup efforts, the council meets monthly to share insights and review and address issues related to InterAction use. The team places cleanup projects into

working lists and then shares them with the council. The council members then update their changes in the list as they update each contact.

### 3 On-Boarding Support

A new partner may have 2,000-3,000 contacts that are valuable to both the partner and the firm. Consequently, the firm requires newly hired lawyers to share contacts with the firm as appropriate. The logistics of following the mandate generally falls to a lawyer's secretary. Previously, there was a lack of support when a lateral attorney hire came onboard. Now, the CRM team helps onboard the contacts for new attorneys so the secretaries don't have to handle thousands of contacts at once.

The firm's client development team works closely with the CRM supervisor's group to determine the appropriate marketing lists for each new contact.

## Client Snapshot

#### CUSTOMER PROFILE:

With roots dating back to the early 20th century, this Am Law 50 firm has approximately 1,000 lawyers and more than 10 offices in the United States, Europe and Asia. The firm's practice expertise includes securities law and regulatory practice, corporate, bankruptcy, environmental, labor and employment, real estate and tax matters.

#### BUSINESS SITUATION:

When the firm wanted to optimize the effectiveness of its InterAction implementation, it laid the groundwork for a remarkable CRM revitalization that cleaned up the firm's list of 669,000 contacts, resulted in an 88 percent adoption rate among the firm's partners and broadened the firm's relationship intelligence capabilities.

#### SOLUTION:

The firm relies on LexisNexis InterAction and InterAction for Microsoft Outlook (IMO).

#### BENEFITS:

- Makes it easy to segment marketing lists
- Reports provide a 360-degree view of the firm's clients
- Built-in rules help the firm manage compliance with Canadian SPAM laws
- Integrates with Vuture, enabling clients to update their own contact information
- Superior data change management (DCM) capabilities support contact information accuracy

#### PRODUCT SUMMARY:

CRM Solutions

- InterAction
- InterAction for Microsoft Office (IMO)

#### 4 Marketing List Maintenance

Upon joining the firm, the CRM supervisor discovered that the firm had numerous marketing lists, so she made managing and maintaining them a priority. One of her first accomplishments was setting up list templates to ensure that the firm's various lists contained the contact information that was most useful for their intended business purpose. As an example, she notes that an event marketing list requires different information than a blog marketing list.

Additional list maintenance procedures include removing the names of deceased individuals from all marketing lists, removing European firms, creating an alumni list that is automatically updated with information on attorneys who leave the firm, flagging and removing incorrect contact information on "returned emails," and allowing contacts to opt-in for the types of communication they prefer to receive.

As a result, the firm has archived 1,700 marketing lists since 2012. Although the contact data of archived lists is preserved in InterAction, the lists are invisible to users.

"There are lots of ways to provide services to make relationship management easy for attorneys so they benefit from the collective power of the firm's relationships."

– CRM Supervisor, Am Law 50 firm

The firm has also implemented Vuture as its email marketing tool. Vuture integrates directly with InterAction for email communications, allowing clients to sign up for the marketing lists they want to receive communications from and also enabling them to update their own contact data.

#### 5 Reporting

Regular reporting ensures that the effort invested to manage the firm's CRM database is actionable. The team copies data from InterAction to a reporting database nightly, then uses Microsoft® SQL Server Reporting Services to create reports. Reports are displayed on an internal website for clients to browse.

Additionally, with the help of LexisNexis Professional Services, the CRM group built a "Top Clients by Practice Group" report that shows the health of top client relationships, including information on email bounce backs and on which marketing lists clients appear.

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## SECURITY GUIDE EASES WORRIES

The firm is enjoying many benefits now that its use of the relationship intelligence capabilities of InterAction has been revitalized.

For one thing, the list cleanup process has allowed the firm to send more targeted marketing communications. As part of the data cleanup, the firm has also added the industry affiliation of all clients, which enables the firm to implement roll-up reporting for financials. The firm is also able to identify potential new clients each month by relying on data from a third-party enterprise business management solution.

“It’s great to see ‘who knows whom’ information directly in Microsoft Outlook, using IMO (InterAction for Microsoft Outlook). This allows the attorney to pull up a person and see who they know on a mobile device. This feature is very popular with the attorneys.”

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Additionally InterAction reports help to provide a 360-degree view of the firm’s clients, making it easier for practice groups to understand how other practice groups in the firm are working with clients.

With InterAction adoption for the firm’s U.S. partners increased to **88 percent** and the contact data now clean and reliable, the firm is enjoying more of the benefits the solution offers. The CRM supervisor relates one telling example: “InterAction saved a partner when he lost all of his Outlook contacts one time. We were able to re-load them for him by using the information stored in InterAction.”

For the CRM supervisor and her firm, the true value in InterAction revolves around relationship building. Once the contact data was cleaned up, leveraging the solution’s relationship intelligence capabilities across the firm with nearly complete adoption by the partners has strengthened its existing client relationships and forged new ones, as well.

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## About LexisNexis

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## About LexisNexis InterAction

LexisNexis® InterAction® (www.interaction.com) is the leading provider of CRM software and services, which enable professional services firms and other relationship-based organizations to create the relationship intelligence they need to uncover new business opportunities.

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