



CRM Helps a Mid-Sized Firm Meet Strategic Goals

“For a law firm, relationships are critical and connections are valuable. InterAction helps us turn this information into new business for the firm.”

– Marketing and Client Service Manager

A mid-sized firm experiencing rapid growth had the foresight to implement InterAction® customer relationship management (CRM) from LexisNexis®. But with no formal training policies in place, the staff was not effectively utilizing the solution or benefitting from its industry-leading CRM capabilities.

The firm’s marketing manager had previous sales experience, which taught her that “CRM is the most important tool an organization can leverage aside from their products.” She knew it was important to educate everyone at the firm regarding the invaluable information InterAction could deliver and experience how CRM could make their jobs easier.

“It was important to explain how InterAction can support the firm in order to gain a firm-wide commitment for CRM from the executive team.”

Persuading a firm with 40 attorneys to utilize InterAction would require a top-down commitment from the entire firm, so her first step was to secure the support of the firm’s executive team. She stressed how their competitors leverage CRM to grow business and how InterAction, the leading law firm CRM system, could provide the capabilities they needed.

The CRM strategy aligned with the firm’s strategic goals and the firm’s leadership was very supportive once they learned the value of CRM systems in law firms.

“Our training and knowledge-sharing programs are key to our CRM success.”

To demonstrate the benefits InterAction offers, the rollout team provided staff with examples of how the CRM system could work. The training began with those who were the most interested and responsive. Some of the CRM adoption efforts instituted at the firm included:

Tailored but Mandatory Training

It is a firm-wide policy for all attorneys, legal assistants, partners and staff to receive InterAction training. Training programs can range from less than five minutes up to an hour, based on needs and availability.

A Transition-Bound Taskforce

In an effort to understand the reluctance of the firm’s biggest naysayers, the client service team held meetings where attorneys could share their issues with CRM. This also gave the team opportunity to explain how helpful InterAction could be in making their jobs easier.

Onboarding through Outlook

Before InterAction, the firm was using Microsoft Excel or notes in Outlook to manage contacts. InterAction for Microsoft Outlook (IMO) was a better way for the attorneys to manage contacts in InterAction. They started both staff and attorneys working in the desktop version first and then transitioned to IMO, helping them gain a better understanding of CRM and the information they would see with the IMO interface each day.

Client Snapshot

AN EMERGING WEST COAST FIRM

CUSTOMER PROFILE:

This growing firm has an experienced team of 40 professionals representing clients in all aspects of real estate, development, transactions, and litigation. The firm prides itself on providing the attention and responsiveness of a small firm with the diverse range of knowledge and expertise that clients expect from a larger firm.

BUSINESS SITUATION:

While the firm already had InterAction CRM from LexisNexis, they had not yet fully implemented the solution. Armed with previous experience in sales, the firm’s marketing manager knew the value of CRM and immediately began moving to get InterAction fully implemented. With the support of leadership, this firm’s training and adoption of InterAction as a CRM solution was successfully established, making it easy to access the accurate client data that is essential to business development. The firm also uses InterAction Mobility to give staff access to CRM data from virtually any location, and InterAction for Microsoft Outlook to make it easier to manage contacts.

INTERACTION BENEFITS:

- Refine Data Collection Process
- Capture Clean Contact Data
- Maintain Historical Records for Contact and Relationship information
- Manage Contacts in Microsoft Outlook
- Identify Valuable Connections
- Segment Targeted Marketing Lists
- Track Referrals
- Scan Business Cards

PRODUCT SUMMARY:

- InterAction is the leading CRM solution for law and professional services organizations.
- InterAction for Microsoft Office (IMO) allows lawyers and secretaries to access and enter contact and relationship information using the familiar Microsoft Outlook interface.
- InterAction Mobility keeps busy professionals connected and informed by enabling access to CRM and business development information at any time from virtually any location.

“Competing CRM solutions are not built around relationship information and contacts. It’s a good idea for prospects to compare solutions and select a CRM that will support firm growth.”

Although the firm evaluated other solutions, they ultimately chose InterAction as the CRM solution that fit their needs. Unlike other solutions considered, they felt InterAction would give them the contact and relationship information critical to the firm’s marketing and business development efforts. Some of the enhanced CRM initiatives and experiences in InterAction include:

The Ability to Build a Centralized Contact Database

By holding drawings at industry events where business cards are submitted, the firm is able to capture potential leads. The team uses InterAction to enter the business card contact information, associate attorneys with those contacts, then track and manage relevant activities.

Accurate CRM Information

Capturing clean contact data is critical to the firm’s ability to build successful relationships with clients and prospects. InterAction helps

refine the data collection processes, ensuring that all client and prospect information is accurate and accessible to the entire practice.

Essential Relationship Insights

The personal details and intuitive relationship intelligence in InterAction provide their attorneys with valuable insights about key attendees at industry events and other law school classmates that could help make business development connections for the firm.

“A CRM strategy aligned perfectly with our strategic goal to grow the firm, and InterAction fit our CRM needs.”

Targeted Marketing Lists

To help attorneys see how easy it would be to create their holiday list using InterAction, marketing produced a simple step-by-step video. They sent attorneys a link that took them directly to their contacts on the holiday card list. Since attorneys had previously been presented with a firm-wide list from which they had to find their own client contacts, the new approach received a great response from the attorneys. One attorney even sent a message to the entire firm telling everyone how easy it was to “clean up his holiday list using InterAction.”

Protect Institutional Knowledge

The firm needed a more concrete way to preserve contact information and have a historical record even if an attorney leaves the firm. With InterAction, they have the reassurance that valuable contact information will remain with the firm. If a client is transitioned to another attorney, all the critical contact and relationship details are retained and accessible.

Expert Technical Support

InterAction customer support delivers on-demand help when needed. The marketing manager found this to be incredibly valuable when an InterAction technical support expert explained the process to address and resolve a specific issue while accessing her desktop remotely.

“With my background in sales, I knew the importance of CRM. The relationship insight provided by InterAction is critical for a growing law firm.”

InterAction helped this small, growing firm build a database of accurate, actionable contact information. More importantly, it provided targeted support for meeting the firm's strategic goals, enabling its lawyers and staff to focus on the relationships that can help grow the business.

About LexisNexis

LexisNexis® (www.lexisnexis.com) is a leading global provider of content-enabled workflow solutions designed specifically for professionals in the legal, risk management, corporate, government, law enforcement, accounting and academic markets. LexisNexis originally pioneered online information with its Lexis® and Nexis® services. A member of Reed Elsevier [NYSE: ENL; NYSE: RUK (www.reedelsevier.com)], LexisNexis serves customers in more than 100 countries with 10,000 employees worldwide.

About InterAction

InterAction® 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. Discover more about InterAction online: interaction.com

[Read about other InterAction customer successes.](#)

INTERACTION.COM

The opinions expressed within this case study represent customer opinions. LexisNexis believes this case study experience generally represents the experience found with other similar customer situations. However, each customer will have its own subjective goals and requirements and will subscribe to different combinations of LexisNexis services to suit those specific goals and requirements. This case study may not be deemed to create any warranty or representation that any other customer's experience will be the same as the experience identified herein. LexisNexis uses the customer's trademarks herein with the customer's permission.

LexisNexis and the Knowledge Burst logo are registered trademarks of Reed Elsevier Properties Inc., used under license. CounselLink is a registered trademark of LexisNexis, a division of RELX Inc. Other products or services may be trademarks or registered trademarks of their respective companies. Copyright © 2017 LexisNexis. All rights reserved.

