



LexisNexis®

INTERACTION® CASE STUDY ROSENBERG MARTIN GREENBERG

InterAction and InterAction IQ Help Successful Mid-Size Law Firm Run “Lean and Mean”

STANDING OUT IN A COMPETITIVE MARKETPLACE

In today’s highly competitive legal marketplace, providing the highest quality services with unparalleled efficiency is a proven way for a law firm to gain an advantage over its rivals. But maintaining the ideal balance requires the right tools and a firmwide commitment to adapt to new ways of doing things. Just ask Jenna Schiappacasse, Director of Marketing and Business Development at Rosenberg Martin Greenberg, a Baltimore, Maryland-based, mid-size law firm that celebrated its 30th anniversary in 2017.

GETTING MANAGEMENT ON BOARD

For Schiappacasse, who rose through the firm’s marketing ranks over the course of her more than 10-year tenure at Rosenberg Martin Greenberg, facilitating change is the name of the game. Along with the firm’s IT director, she successfully lobbied the firm’s managers, convincing them of the value of implementing a customer relationship management (CRM) solution.

A REPUTATION FOR EXCELLENCE AND EFFICIENCY

Throughout its 30-year history, Rosenberg Martin Greenberg has strived to provide its clients with the best legal services available, at competitive rates. That commitment to excellence has required the firm’s attorneys and support staff to operate with a high degree of efficiency in everything they do, including maintaining contact with clients and prospects.

AN OUTDATED SYSTEM IN NEED OF REPLACEMENT

Over time, however, the growing body of marketing lists began to take a toll on efficiency. Working with an assemblage of fragmented lists, including the firm’s accounting database with client contact information, holiday gift lists housed in an antiquated precursor to a true CRM system, and a number of marketing lists created in Microsoft Excel and housed in the document management system, the firm lacked the insight required for business development initiatives. “We didn’t know who knew whom,” Schiappacasse says. “We didn’t know where people were going because there was no easy and efficient way to keep up with job changes and title changes.”

She also notes that the firm was experiencing an unacceptable—and expensive—volume of returned mail due to inaccurate information. This was especially apparent during the holidays, when a large number of client and referral appreciation gifts were not deliverable and had to be re-sent. Schiappacasse was determined to implement a better system.

INTERACTION TO THE RESCUE

After getting the firm's management on board by explaining how a CRM system would increase efficiency, reduce unnecessary expenses, and make their lives easier, Schiappacasse began digging into the pros and cons of several of the most popular CRM solutions available. When the dust settled, she selected InterAction®.

Her choice of InterAction was fueled by several key factors. Chief among these were its ease of use, its integration with Microsoft Outlook, the attractive interface, and the multiple options for offering second-level training.

IMPLEMENTING AN EFFICIENT SYSTEM

Once the decision to go with InterAction was finalized, the next step was to prepare for implementation. Training was key to this phase of the rollout. Working closely with the LexisNexis training team, Schiappacasse coordinated Train the Trainer sessions to prepare the firm's in-house trainer to educate attorneys, paralegals, and administrative support staff on the basic functions of InterAction. She also arranged for additional training for individuals who needed to access higher-level capabilities of InterAction.

INTERACTION IQ AND MOBILITY ADD VALUE

Pleased with the results of its implementation of InterAction, Rosenberg Martin Greenberg adopted InterAction IQ. InterAction IQ mines InterAction activities, email, and calendar items for clues about relationships that exist among the contacts in its database. The firm uses the sophisticated data mining capabilities of InterAction IQ to clean and update the InterAction database using the information in email signature blocks. Approximately six months after implementing InterAction IQ, the firm introduced InterAction Mobility, which allows attorneys and staff to access the InterAction database from their mobile devices.

Client Snapshot

ROSENBERG MARTIN GREENBERG, LLP

CUSTOMER PROFILE:

Rosenberg Martin Greenberg, LLP is a 32-attorney law firm based in Baltimore, Maryland. The firm has extensive experience in the areas of commercial lending, litigation, real estate, creditors' rights, business planning and transactions, tax and wealth planning, and tax controversy.

BUSINESS SITUATION:

Rosenberg Martin Greenberg required a CRM solution that would enable the firm to manage and leverage client contact information and provide the data needed to make decisions. The CRM had to be easy to use and increase data management efficiency with a minimum of administrative support.

SOLUTION:

InterAction® and InterAction® IQ ensure the accuracy of the firm's contact data and allows marketing to track high-potential client relationships and new business resulting from firm-sponsored events.

BENEFITS:

- Facilitates efficient management of marketing lists
- Enables tracking of referrals and event success
- Provides actionable information for strategic decision-making
- Automates entry of new employees' contact information

PRODUCT SUMMARY:

Corporate Solutions

- InterAction
- InterAction IQ
- InterAction Mobility

THE BENEFITS

AUTOMATION

Rosenberg Martin Greenberg relies on InterAction to automatically enter new hires' contact information on the backend, ensuring accuracy of data with no effort on the part of the employee or the firm's support staff.

POST-EVENT TRACKING

Now that its contact database is accurate and up-to-date, marketing personnel are able to monitor client referrals and attendance at firm-sponsored events and then track any new business that results.

EFFICIENCY

Maintaining accurate and up-to-date contact and mailing lists is easy with InterAction®. Unsubscribe requests are much easier to deal with, and with fewer bounce-backs, the firm's administrative staff can devote more time to higher-level duties.

“We rely on technology to operate efficiently without too much overhead. InterAction is the secret weapon that allows us to run lean and mean.”

– Jenna Schiappacasse
Director of Marketing and Business Development
Rosenberg Martin Greenberg

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® (www.lexisnexis.com/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.

VISIT:

LEXISNEXIS.COM/INTERACTION or contact your account manager for details.

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