

CRM: What Lawyers Need to Know

You've worked hard to build your practice and develop strong relationships with clients and prospects. Contact Relationship Management systems (CRM) can help you maximize these relationships and expand business development opportunities across the firm. Maybe this is the first time you're hearing about CRM, maybe your marketing team has been pushing one for years. Now is the time to think about making CRM part of your business development strategy.

Being a Great Lawyer is Not Enough

Competition is fierce. It is no longer enough to be a great lawyer or provide excellent service. In addition to understanding your clients' industries, you need to understand your competition, and you absolutely must keep in touch. It is human nature to refer business to people you know, like and trust, but if your contacts aren't hearing from you on a regular basis, you are losing a valuable opportunity.

Stay Top of Mind

What good is an e-alert or blog post if it is not seen by the right audience? A successful CRM program allows you to share collective intelligence so that everyone knows when an important contact moves to another company or changes jobs. This information can be used to answer who knows whom, identify opportunities to offer new services to clients and nimbly respond to proposals. When everyone contributes to your CRM, you can stay top of mind by staying in touch and ensuring that your communications are received by the right people at the right time.

Address Common Concerns

Have two partners from your firm ever pitched the same client without knowing it? Has an important client or referral source ever been left off a firm mailing list? Do you struggle to get your holiday cards out every year? These are just some of the concerns that can be addressed through an effective CRM program. You can track your business development and marketing activities and your time, money and resources to ensure your strategy is both effective and efficient.

Learn more at
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Make CRM Part of Your Strategy

CRM is a powerful tool, but it is only effective when utilized as part of your overall marketing and business development strategy. Some of the common frustrations CRM can address:

- Clients and contacts receive information that is irrelevant to their industry or potential legal needs
- An important client or prospect did not receive an alert on a significant issue or was overlooked on the invitation list to a large firm event
- A large portion of your mailings are returned/undeliverable because the information used was out of date
- You (or your colleagues) write blogs or e-alerts that never make it to clients or prospects
- The firm is limited in the number of alerts, mailings or invitations it can send due to the amount of time it takes to create a list
- Clients are on the receiving end of simultaneous, uncoordinated business development approaches from different groups or lawyers within the firm

Questions to Ask Your CRM Vendor

When looking for CRM, make sure to ask your CRM vendor the following questions:

- What is your adoption rate? In other words, what percentage of lawyers are using your CRM system? (When lawyers' contacts don't get into the system, data becomes quickly outdated and your communications do not get to your prospects and clients.)
- How many law firm clients do you serve? Please provide a list of referenceable CRM customers in the legal industry.
- Please describe your best practices and training. What guidance do you provide along the way?
- What is the turnaround time for customer service related inquiries?
- Who owns the contact data and where is it housed?
- What is the process for getting data back should we part ways with a vendor?
- Are there fees on top of the original licenses? What are the renewal fees?
- Does your software require additional personnel to manage the day-to-day maintenance? How much time does that require?
- Do you integrate with our other software programs (such as time and billing and marketing automation)? If so, what are the associated costs?
- Can you show us your sales pipeline management process?
- How will the CRM system grow with the firm (through mergers and acquisitions)?
- Ask every vendor - what CRM do you use to run your business?

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