

The 29th Annual MARKETING PARTNER FORUM



Partner Talk #2: It's 10pm, Do You Know Where Your Prospective Clients Are?



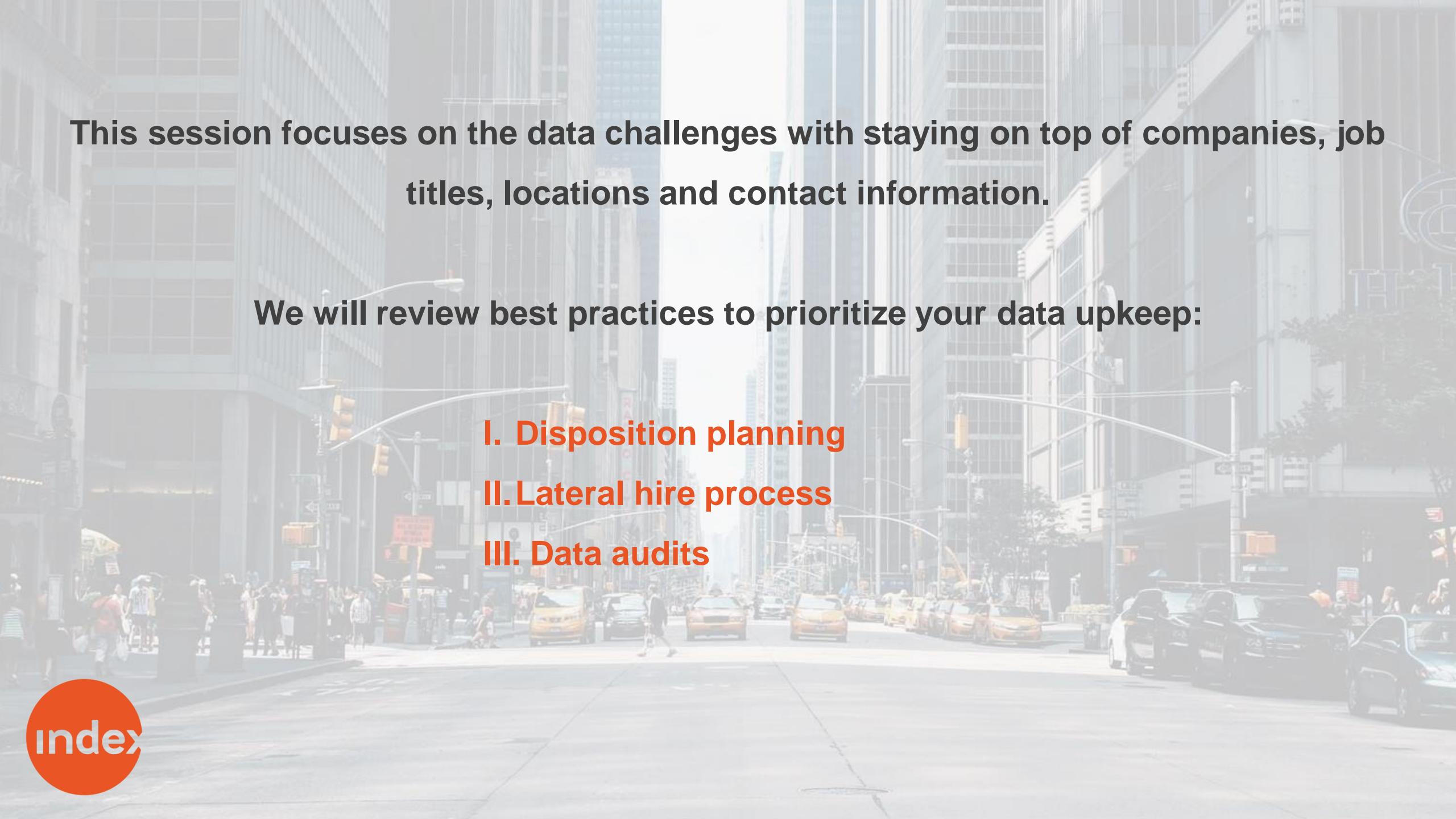
Scott Winter
Vice President, Client Development





It's 10pm,
Do You Know Where Your Prospective Clients Are?

- January 20th, 2022



This session focuses on the data challenges with staying on top of companies, job titles, locations and contact information.

We will review best practices to prioritize your data upkeep:

- I. Disposition planning**
- II. Lateral hire process**
- III. Data audits**

The Index solution leverages **proprietary software**
combined with **humans** to **proactively** research and
update your contacts



Eliminate Noise

“Does this record serve a purpose?”

Everyone,
Marketing Department
All Law Firms LLP



Disposition Planning

Pro Tip: Supports data privacy laws in addition to eliminating inactive records.

Points to consider with your GC:

- Leveraging your firm's current disposition program and adding CRM data to the policy
- How long should you keep data if there has not been any activity (consider consent vs no consent)
- What are you permitted to do to re-engage with a contact before deletion
- How do you segment data for deletion
 - CRM activities (email marketing, business development, partner outreach, etc.)
 - ERM engagement
 - Other integration points



Think of this as a 2022 Spring cleaning exercise!

Avoid Bad Data

“Tis the season for lateral hires!”

Sheila Mennis,
Sr. Manager, Marketing Information Systems
Duane Morris LLP

index

Lateral Hire Process

The lateral hiring process is timely, stressful and expensive.

- Relationships are one of the most critical components to recruiting a lateral
- The lateral process is an investment and the new data should be treated equally

The **Index Solution**:

- Secure upload of the lateral's, often unformatted, spreadsheet of contacts
- Each record is individually researched
- Each record is updated and gaps are filled in such as missing location and job title
- The **CLEAN** data is sent back to you in a formatted spreadsheet or directly integrated into your CRM (InterAction® and Salesforce®)



Give your new lateral the gift of an up-to-date list of contacts!

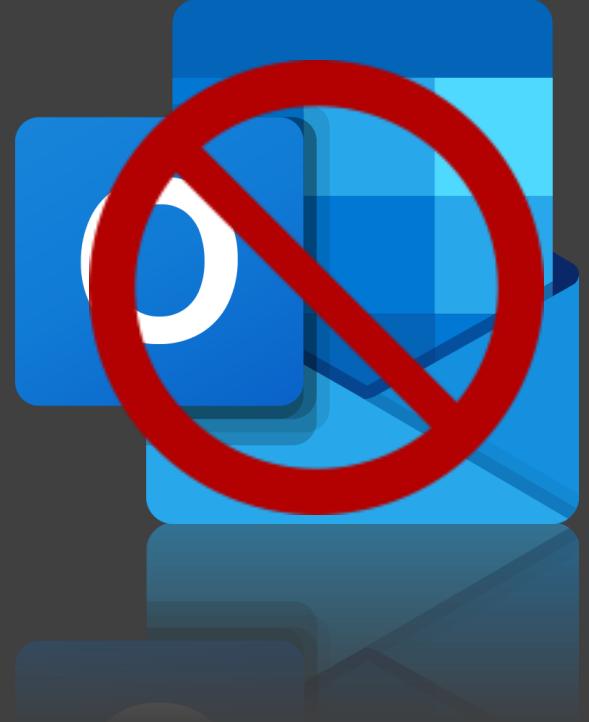


Bonus: New Contact Collection

Pro Tip: Leverage your ERM for new contacts vs Outlook

Points to consider:

- Avoid outdated Outlook records
- Automate the contact collection process
- Signature capture is only as good as the signature, **let Index fill in the gaps**
- Those of you on InterAction, be aware of the KNOWS process...



Only bring useful and engaged contacts into your CRM!



Execute Data Strategy!

“Index is supporting our data strategy by providing our partners a more pristine version of the original record.”

Patty Azimi,
Sr. Marketing Technology Manager
Akin Gump Strauss Hauer & Feld LLP



Top Clients | Alumni | Targeted Lists

What does **YOUR** data look like?



22% Record accuracy

- 78% Name changed
- 33% Company changed
- 33% Location changed
- 22% Job title changed
- 78% Contacts Requiring Cleaning

index

- 78% Contacts Requiring Cleaning
- 22% Job title changed

Scott Winter
VP, Client Development
919-923-6493
scott@index.io
<https://index.io>



The 29th Annual MARKETING PARTNER FORUM



Partner Talk #2: It's 10pm, Do You Know Where Your Prospective Clients Are?



Scott Winter
Vice President, Client Development

