TIME TO GET ENGAGED!

Enticing Lawyers to Commit to Marketing Technology

+

Transformational Social Impact Strategies

Tapping Into Employee Advocacy Through Social Media

GETTING ENGAGED: ENTICING LAWYERS TO COMMIT TO MARKETING TECHNOLOGY

CHRIS FRITSCH

While it may seem shocking that more than half of marriages end in divorce, what may be a more engaging statistic is that technology implementations frequently have a similar fate. In fact, according to a report from the International Data Corporation (IDC), the deck is stacked against tech: up to 50% require significant reworking, 20-25% don't show return on investment and 25% of projects fail completely. And while many people may take the leap and get married again, you often don't get a second chance at a failed marketing technology implementation, especially in a law firm. That separation is frequently final.

In today's hyper-competitive legal marketplace, where attorneys are being required to learn new skills like project management and alternative pricing, you would think they would eagerly embrace any marketing technology that could help them gain an advantage. And yet lots of lawyers still seem to have a love/hate relationship with technology. It's not that lawyers can't commit — they just don't see the need to. They don't seem to be wedded to the concept that taking the time and effort to learn and regularly use technology will make their lives easier and their practices more profitable.

The Betrothed

When considering lawyers' sometimes casual attitude toward technology, it's also important to comprehend another critical reason why legal technology and attorneys are not always a match made in heaven: the lawyers themselves. Many lawyers are not particularly tech-savvy, and research into the lawyer personality also describes a few potentially challenging attorney traits:

- Skeptical
- Hypercritical
- Independent
- Risk averse
- Reluctant to share
- Resistant to change

While these may be beneficial attributes for the practice of law, they are not particularly helpful for encouraging technology adoption. In fact, as a managing partner we worked with once said, "Trying to get attorneys to

do anything can be like herding cats." (Even more challenging: these are very smart cats with opposable thumbs). Plus, in a law firm time is money (literally), so attorneys typically don't cherish any activity that requires time to be taken away from billing unless it can provide lasting, long-term rewards.

The Institution

But it's not just the attorneys who can get cold feet. Firms have forever had a perpetual on-again/off-again relationship with technology. While many may be willing to invest significant sums to purchase the latest and greatest systems — especially if other firms have them — they often abandon these tools later on when they realize the additional time, effort and resources that are required to be successful. They want the benefits of the relationship, but are unwilling to put in the work.

There are a number of other reasons why encouraging technology adoption in a law firm can be difficult. Some firms are resistant to change, preferring the precedent of the status quo. Still others are slow to adopt new technology, even though it may be detrimental to their future success. Additionally, it can be particularly challenging, if not nearly impossible, to mandate anything in a law firm, especially software use. Add to this registry of criteria the fact that in many firms there is often no real accountability. These issues are often compounded by compensation systems that don't encourage collaboration.

A Promising Courtship

While lawyers and technology may initially seem incompatible, If attorneys take the time to get to know their marketing technology, they might actually fall in love because of the long-term benefits like:

- Solving problems
- Automating processes
- Improving efficiency
- Reducing data entry
- Saving time and money
- Improving communication, coordination and client service
- Enhancing business development and increasing revenue

It's not that attorneys are needy; they just have to see what's in it for them before committing. But, of course, a successful relationship takes two.

The Perfect Partner/Provider

The beauty of technology is that it can do so many things. The problem with technology is… it can do so many things. But for technology to succeed, it has to satisfy a need. So it can be a mistake to fall for any type of technology too quickly. Frequently, firms get infatuated with the latest and greatest software without fully investigating other options or, more importantly, really understanding their unique requirements.

Because each firm is unique, technology selection should start with a needs assessment. Interviews should be conducted with key stakeholders to determine how the technology can really help them. It's

important to focus on people, processes and problems first, and products second. Additionally, this type of open dialogue can have the added benefit of getting users engaged in the process early on.

Even after a firm has a grasp on the technology requirements, finding a good partner isn't always easy. While the types of software offerings and number of eligible providers have increased exponentially in recent years, the technology still sometimes gets a cool reception. Lawyers express frustration that the tools being offered just aren't a good match for a number of reasons, such as:

- Complicated interfaces
- Siloed systems
- Access issues
- Too many required fields
- Duplicative data entry

To win over attorneys, providers have to offer more than just bells and whistles. They have to be willing to invest in the relationship, taking the time to understand the firm and its attorneys' unique needs. This way, providers can focus on offering real value and keeping attorneys from being distracted by other pursuits (like billing time). They should also solicit feedback to continuously improve both the software and the relationship. Most importantly, they should provide superlative service and long-term support.

The Prenup

Once a provider has been selected and their proposal is accepted, firms should still

do their due diligence before applying for the license (or subscription). Before jumping in too quickly, invest the time to really get to know the partner/provider. Check references to see how their past relationships have fared (as the saying goes: trust, but verify). Ask open-ended questions to elicit a helpful dialogue. A reference checking sheet can be useful to make sure you "pop" all the right questions. It may also be helpful to see if others in your network have experience with the provider. This is where you can tap into one of the best benefits of LMA: the ability to exchange information and support each other.

Another way to ensure that both parties stay together is to negotiate a mutually beneficial technology agreement. A well-crafted contract should be fair and balanced and include protections for both parties. It may also be advisable to include an "out" clause to ensure that any possible "break-up" will be amicable.

The Planning

Like any successful ceremony, a technology deployment requires extensive planning. There are a number of important considerations, but based on experience working with hundreds of firms on successful marketing technology implementations, here are the most effective planning elements we frequently propose:

Training: Firms that are successful with technology put an emphasis on training. For many systems, training is best conducted one-on-one in attorneys' offices, using information that is both real and relevant. Training should not be a one-size-fits-all approach. Instead, customized training should be provided to different groups based on their needs. To accommodate varied learning styles, supporting materials should be provided in a variety of formats, such as videos, presentations and quick reference guides. Additionally, while training during the initial rollout is important,

it is also essential to focus on the future and plan for new hire training, as well as refreshers to reinforce key concepts. While this may not sound like the quickest or easiest way to train, the investment will pay dividends.

Communication: The key to any relationship is communication. Attorneys must be convinced that technology will benefit the firm and, more importantly, them individually. Taking the time to craft a formal communication plan can be valuable. Start with an announcement from firm leadership extolling the system benefits. Set realistic expectations not only about potential system value, but also user requirements. Be sure to provide documentation to answer any questions that may arise. Finally, develop, document and distribute any processes and procedures needed to support the implementation. Remember that sharing is caring, so always provide feedback and communicate successes. Some firms even create internal branding campaigns and give away "presents" to encourage enthusiasm for new technology.

Integration: A good marriage also requires integration. Bringing together information from a variety of systems can often exponentially improve the value of technology. For instance, tying together the firm's customer relationship management (CRM) and time and billing systems can help identify key clients and cross-selling opportunities. Bringing in expense reimbursement information can help create business development activities and enhance coordination. Enterprise relationship management (ERM) data can assist in identifying the strongest connections. A portal connection can provide a threshold to various information sources in a single location. However, while these types of integrations can provide benefits, it's important to think through any potential costs as well. You don't want a system slowdown or crash to put a premature end to your attorneys' budding relationship with the new technology.

Data Quality: Be prepared to deal with your data because nothing gets dated faster. Without care and attention, up to 30% of the information in your systems can degrade each year. Attorneys can quickly become jaded and may feel that if the data is bad, by association, the system is bad. This means that building trust in technology also requires a perpetual commitment to data quality. Initial loads of data must be deduplicated since attorneys often know many of the same contacts. A standards guide should be created for consistent data entry. Finally, because perpetual data quality is essential to technology adoption, internal or outsourced data stewards should be dedicated until… always and forever.

Accountability: Without some level of accountability for system utilization, some users will stray. In the past, a few firms tried tying system usage to compensation or expense reimbursement, with mixed results. Instead, consider creating contests to encourage healthy competition while getting users to try out new tools. Publicly recognizing accomplishments will also help to get others on board.

Resources: Frequently, firms don't take into account all of the costs associated with a technology deployment. To succeed, a firm must vow to dedicate the necessary resources, including time, money and people. It often takes the coordinated efforts of a full party of stakeholders to pull off a successful technology implementation, so be sure to invite everyone who may need to be involved, such as:

- Firm leadership to convey the importance of the implementation
- Key attorneys whose support will be essential to encouraging participation
- Marketing/ business development to help develop the strategy, drive the process and assist with coordination and communication
- IT to assist with implementation and any necessary integrations

- Trainers to create curricula and educate users
- Assistants whose participation can be critical since they often do much of the "heavy lifting"
- Internal or outsourced data stewards to make sure data is clean, correct and complete
- Accounting, finance, HR and help-desk if their data or assistance will be beneficial

The Honeymoon

Once a firm is ready to begin technology implementation, it's important to focus on doing everything possible to ensure that the initial "honeymoon period" of the rollout is blissful. One way to do this is to start small. Begin by finding a pilot group of attorneys who could really benefit from using the technology. Look for a group with a strong leader and an interest in marketing or business development.

Spend some quality time talking to group members and getting to know their desires. Are there problems they want solved, processes they want automated or information they need access to? Adopt and adapt the technology to meet those needs. Don't forget to provide adequate support, too. While some attorneys may want to use the system themselves, others may need hand-holding from their assistants or the marketing team. During the pilot, solicit feedback so group members feel heard and incorporate suggestions that may improve the implementation.

Once the pilot is successful, it can then be repeated with additional groups. One firm we consulted with discovered that the honeymoon pilot phase doesn't have to end. When their initial pilot had to be extended, they found that treating additional groups as pilots actually allowed them to customize the technology and nurture each group's needs, which had the added benefit of making sure each group felt the love.

The Anniversary

For better or worse, the union of lawyers and technology may not seem like an easy affair, but for firms that are willing to commit the time, effort and resources, the benefits will likely leave them feeling happy ever after, which certainly has a nice ring to it.

Finally, all lasting relationships require ongoing attention. This means that a successful marketing technology implementation shouldn't be seen as a project or an initiative, but rather a long-term commitment that never really ends. The good news is that this means that you have "from this day forward" to work on improving the relationship. ∎

Chris Fritsch is a business development technology success consultant and the founder of CLIENTSFirst Consulting. For more than 12 years, her team of almost 100 consultants and other professionals has been helping law firms and other organizations successfully select and implement business development technology to maximize value, adoption and return on investment. If you need help with CRM Success, please contact CLIENTSFirst Consulting at 404-249-9914 or Info@ClientsFirstConsulting.com.

The content in this feature correlates directly with the Technology Management domain in the LMA Body of Knowledge. To dive deeper into this subject area, head to the Communications BoK domain here: **http://bit.ly/LMABoKTechMgmt**.