

# Increasing Lawyer Engagement with Marketing and BD Technology

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# Body of Knowledge (BoK) Domain and Competency

- Domain: Marketing Management and Leadership
  - Competency: Management of Individual Personnel



- Domain: Technology Management
  - Competency: Social Media & Engagement



# Learning Outcomes

- Establish what gets in the way of lawyer engagement with technology
- Identify examples of successful approaches for increasing engagement
- Demonstrate and share ways to increase engagement by providing value to attorneys
- Evaluate options to supplement attorney participation through automation or engagement from other key personnel

# About Chris Fritsch, JD



**Founder CLIENTSFirst Consulting**

**BD Technology Success Consultant**

**Background in CRM, technology & eMarketing Success**

**Team of more than 100 consultants and professionals**

**12 years helping hundreds of top firms**

**Fellow, College of Law Practice Management**

# About David H. Freeman, JD



**Founder, Law Firm CultureShift**

**195 Law Firms, 45% AmLaw200**

**Coached and trained thousands of lawyers over 25 years**

***National Law Journal* 3 consecutive years #1 BD coach/consultant**

**Two-time all-time best-selling author**

***National Law Journal* Hall of Fame**

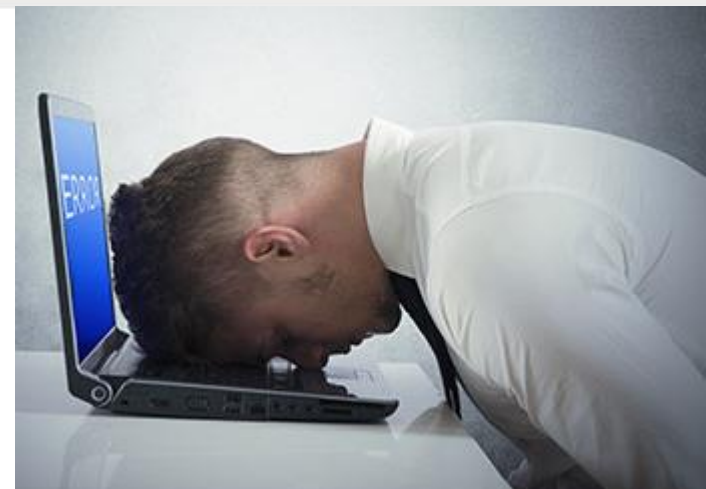
# Why We're Here Today

**Up to 70% of CRM and  
other business  
development technology  
implementations fail to  
meet expectations**



# Reasons for Technology Failure

- Unrealistic expectations
- Failure to assess needs
- Lack of management support/ownership
- Optional participation
- Inadequate communication/training
- Lack of strategy or planning
- Failure to commit necessary resources
- Lack of adoption by users
- Poor data quality
- and ...



***“(Failure due to) Sole reliance on a single BD person to remind the lawyers to follow through.”***

# ... Lawyers

- Skeptical
- Independent
- Resist sharing
- Too busy billing time
- Hypercritical
- Risk averse
- Not technology savvy/slow to adopt
- Resistant to change

*“Lawyers not willing to put in the effort to market - it had never been required of them.”*

*“Not engaged in the concept of marketing.”*

*“Unable to get attorneys' attention.”*





# Most Importantly ...

**Don't P!#\$ off the  
secretaries!**



# Firm Culture: *The Elephant In the Room*

- Lack of leadership support
- Impossible to mandate
- Compensation systems
- Lack of accountability
- Politics

*“Management does not make it a priority.”*

*“Generalized or lack of tracking, lack of follow up, not clearly showing benefits.”*



# Process Problems

- **Complicated interfaces**
  - **Access issues**
  - **Time constraints**
  - **Uncoordinated efforts**
  - **Too many required fields**
  - **Information silos**
  - **Duplicative data entry**
- and...**



# Bells and Whistles

- To much focus on features and functions
- Avoid the dog and pony show
  - Instead, focus on value and individualized benefits



# Success Is Possible!



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# What's In It for Them

- Involve key stakeholders early and often
- Focus on individual benefits and value
- Set realistic expectations
- Automate processes
- Solve problems
- Save time
- Communicate value
- Gather and implement feedback

*“Set goals and actions for individual practice areas.”*

*“Develop understanding that their personal success and growth requires marketing and business development.”*

# Make Process a Priority

- **People and process first**
  - ☐ **Products second**
- **Select the right technology**
  - ☐ **Assess specific needs / requirements**
  - ☐ **Analyze workflows**
  - ☐ **Reduce data entry points**
  - ☐ **Consider integrations**
- **Configure the system to meet needs**
- **Set realistic expectations**
- **Define measurable, achievable goals**
  - ☐ **Achieve incremental goals**
  - ☐ **Communicate successes**
  - ☐ **Repeat...**



## Change Management

- Find early adopters
- Pilot groups
- Educate/train/teach
- Communicate
- Demonstrate ROI
- Dedicate resources
  - ☐ Time
  - ☐ Money
  - ☐ People



***“Target individual users and their pain points.”***

***“Pilot programs have been my best tool yet.  
When an attorney feels they are part of a  
special group, they tend to be excited about it.”***

***“Develop understanding that their personal  
success and growth requires marketing and  
business development.”***



# Support: *Enroll Change-Makers*

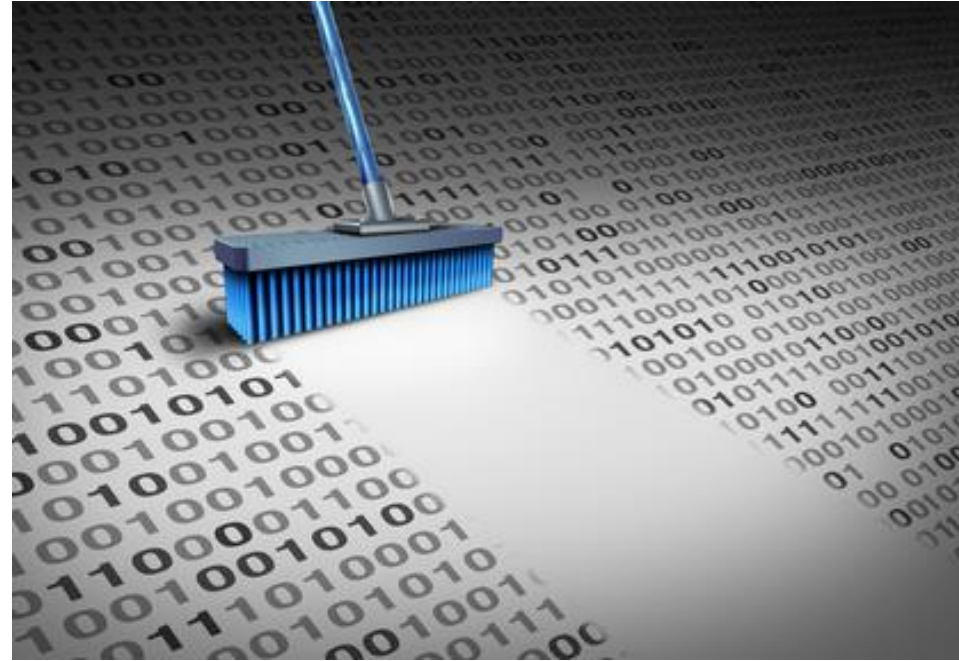
- IS/IT
- Technology projects manager
- Data stewards
- Helpdesk
- Senior champions
- Vendor support
- Trainers
- Liaisons/key staff members
- Sales/BD staff
- Coaching



*“One-on-one coaching has provided some of the best results, because it takes away the fear of asking a “dumb” question, and it allows the individual to learn at their pace and in the manner in which they learn best.”*

# Focus on Data Quality

- Assess the ‘mess’
- Append missing data
- Automate where possible
- Add countries for compliance with privacy laws
- Review and correct bad info
- Data resources are essential
  - Initial and ongoing
  - Internal or outsourced



***“If the data is bad, then the system is bad.”***

# Leadership Commitment

*“Having engagement be required by leadership didn't work in a previous firm. To my best guess, it's because there are already so many requirements from leadership, that the validity of engaging with marketing technology didn't seem to be a high priority.”*

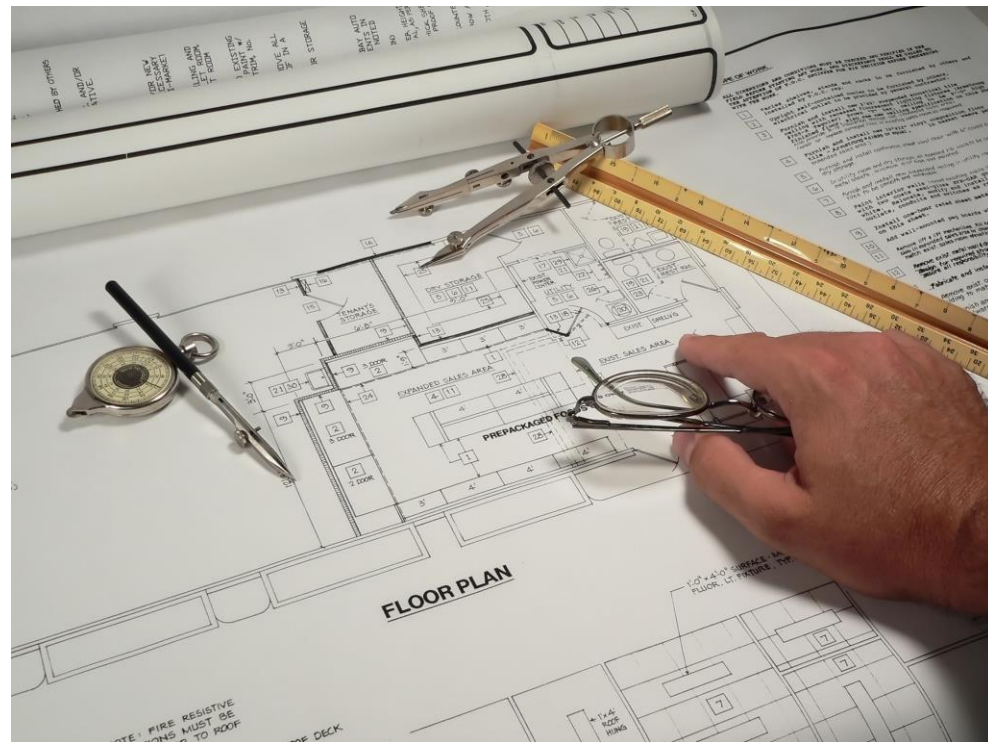
*“Leadership pressure proves effective.”*

*“Required by leadership.”*



## Key areas

- Selection
- Rollout
- Systems integration
- Data quality
- Training
- Communication



***“Set goals and actions for individual practice areas.”***

- Different training for different users
- Real life data and scenarios
- Deskside visits
- Accommodate different learning styles
- Lunch-and-learns
- Required sessions for associates and/or staff



*“Training provides a more thorough understanding of the 'why' proposition.”*

*“Train newly hired attorneys.”*

*“Used short videos to train people.”*

- Transparency
- Track progress and results
- Create and enforce rules
- Expense reimbursements
- Performance evaluations
- Tie to compensation
- Competition





# Incentives & Rewards

- Bonuses
- Gift cards
- Awards
- Contests
- Recognition
  - Kudos in firm publications
  - Certifications



***“Individual and group praise.”***  
***“Client Outreach Derby tied business development to a contest. Attorneys and staff could get points by learning new business development-related technologies.”***

- Bursts/bullets
- Feedback surveys
- Get their attention
- Use multiple methods and channels
- Share data on progress and successes

*“Develop understanding that their personal success and growth requires marketing and business development.”*

*“Linked results to an internal newsletter and front page of the intranet.”*

*“They have seen clients come in based on the blogs they have written so they are seeing results.”*

*“Use the ‘everybody else is doing it’ approach.”*





# The REAL Key to Success ...

**FOOD !!!**



# Final Success Tips

- Be patient - don't try to boil the ocean
- People, process and problems first, products second
- Small wins, communicate successes, repeat
- Involve end users
- Focus on best practices
- Don't reinvent the wheel
- Don't do it alone - reach out for help
  - ☐ Consultants
  - ☐ Providers
  - ☐ LMA peers
- Subscribe to CRMSuccess ([www.CRMSuccess.net](http://www.CRMSuccess.net))



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# Questions

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