



# **Technology Tools, Tips & Trends**

## **for More Effective Marketing & Business Development**

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CRM and Business Development Technology  
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- 15 years experience working together with more than 300 top law firms across the country
- Background in Law, CRM Technology, Competitive Intelligence & Business Development
- Focus on Client service and CRM Success
- Team of more than 100 professionals
  - CRM Success consulting
  - Outsourced data quality and enhancement
  - Competitive intelligence reports

# My TED Talk Ideas

**Barely**

- Reviving the Rolodex: Getting By without a CRM
- Excel-erating Your Business Development Tracking
- Client Business Research is Overrated  
**Clients Just Want Smart Lawyers from Good Schools**
- Winging it: Tested Networking Strategies from Lawyers  
**Who Rarely Get Hired**
- Business Development Technology on a Budget:  
**Invest Less in Your BD Success**

# The Trends

- Predictions that the CMO's technology budget will soon outpace the CIO's technology budget
- Cloud based technology is finally gaining some traction
  - CRM, social media, blogging
  - One top firm noted that more than 90% of the firm's technology and data are in the cloud
- Marketing technology managers are evolving because of the need to create strategies for managing legal marketing technology

# The Tools

- The old toolbox
  - CRM
  - ERM
  - Proposal management
  - Experience management



# CRM

- The great thing about CRM is that it can do 1000 things
  - The problem with CRM is that it should really do only 3

# CRM Jobs

- List management
- Event management
- E-mail campaigns
- Who knows who
- Who knows what (experience / expertise tracking)
- Improved Client service
- Reminders for follow up
- Activity tracking
- Targeting / segmenting
- Research communication
- Information delivery
- Industry marketing
- Opportunity identification
- Opportunity tracking
- Pitch / RFP tracking
- Referral tracking
- Marketing expense tracking
- Marketing budget tracking
- Alumni programs
- Client team support
- Cross selling support
- ROI on sponsorships / tickets
- Identification of top or at risk Clients

# ERM

- Who knows who
  - Based on e-mail traffic patterns
- How well
  - Relationship strength indicators based on algorithmic data on recency and frequency of communication



# Proposals and Experience Software

- Manage multiple bios
- Coordinate pitches and RFPs
- Track successes
- Assign tasks
- Monitor activities
- Integrate with time and billing to capture matters and experience data

# The New 'Power' Tools

- Marketing automation
- Pipelines
- Signature capture
- Business intelligence
- Social media tools
- Data feeds
- Mobile (anything)
- Gamification



# Marketing Automation

- Go beyond e-mail marketing
  - 'Drip' campaigns
  - Follow up communication based on viewer actions
- Systems that have buzz outside legal
  - Marketo, Pardot, Eloqua
    - Don't waste the money without a strategy
- Systems that integrate with legal CRM systems
  - Concep, Saturno, Tikit, Vuture

# What's in the Pipe

- Tracking business development efforts
  - Targets, opportunities, pitches, RFPs, Referrals, Sponsorships
- Capture important information
  - Stages
  - Tasks
  - Activities
  - Reminders
  - Probabilities
  - Outcomes
  - History
  - Custom Fields



# A New Concept: Let Lawyers Be Lawyers

- Take the lawyers out of the picture
  - Capture or scrape contact info from signature blocks
  - Utilize gathered information for data quality
  - Gather relationships from communications
  - Enhanced data in the system with feeds from external sources
- The challenge is that often the data is dated or incorrect
  - And attorneys don't trust bad data

# Company Data Feeds and Info

- Thomson BDP
- InterAction Intelligence Subscriptions
- D&B
- OneSource
- Gwabbit



# It Wouldn't Be a Marketing Presentation Without...

## A Slide on Social Media

- JD Supra / Lexology
  - Distribute content to a wider audience via social channels
- Manzama
  - Social 'listening' to provide competitive advantage
- Clearview Social
  - Share information to enhance business development efforts

# Have Some Fun

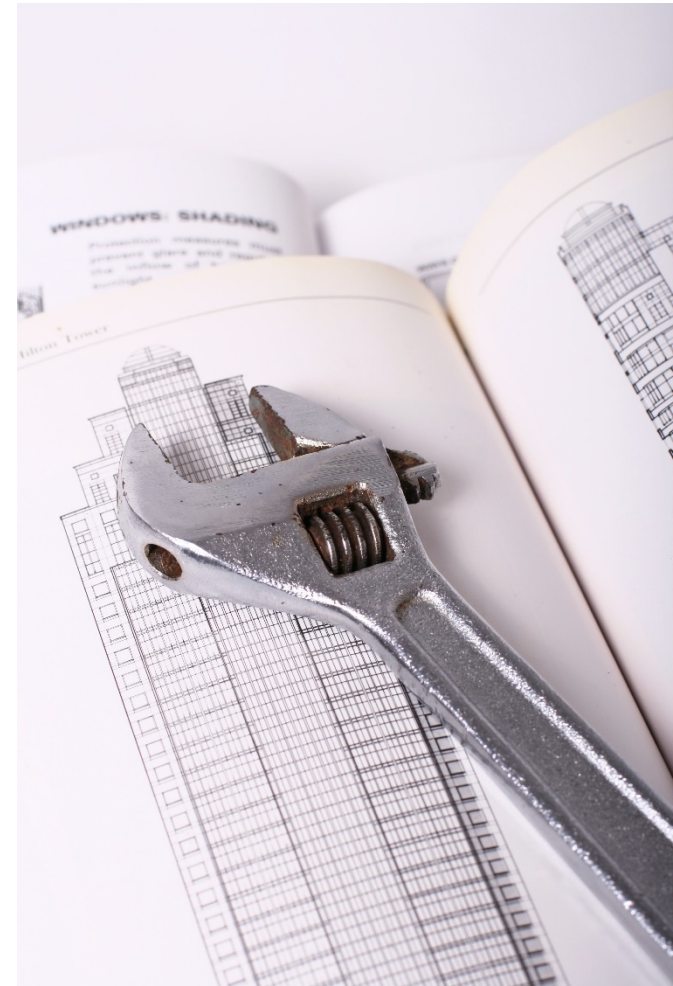
## Gamification

- Increase technology adoption
- Appeal to lawyers' competitive nature



# Throwing a Wrench Into Things

- Up to 70% of CRM (and other technology) implementations fail to meet expectations
  - You often don't get a second chance
- The problem has more to do with people and process than technology



# Reasons for Failure

- Lack of buy-in: management, end users and staff
- Lack of adoption
- Lack of resources: time, money and people
- Lack of strategy
- Incomplete planning
- Lack of adequate training
- Change management issues



# If at First You Don't Succeed...

## Try a Bigger Hammer

- Plenty of firms have tried to roll out some of these tools more than once
- More / different technology is not necessarily the answer



# Success Tips

## Hitting the Nail on the Head

- Technology should provide real value
  - ☐ Solve problems
  - ☐ Automate processes
  - ☐ Save time and money
  - ☐ Improve communication, coordination and client service
  - ☐ Enable business development
  - ☐ Enhance revenue



# What If All You Have Is a Hammer

## Marketing Technology on a Budget

- CRM
  - ☐ Free cloud based platforms
- Business development opportunities
  - ☐ Cloud based pipeline tools
  - ☐ Excel
- eMarketing
  - ☐ MailChimp, Constant Contact
  - ☐ Survey Monkey
- Social media
  - ☐ Free blogging platforms
  - ☐ Hootsuite



# Final Success Tips

- Don't try to boil the ocean
  - Set a limited number of goals that are measurable and achievable
  - Define metrics for success
  - Repeat
- Don't do it alone
  - Ask for help from:
    - Your Network
    - Peers
    - Providers
    - Consultants
    - ALA / LMA
- Assess your needs and marketing technology
- Sign up for CRM Success

Q & A



# Contact Info

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