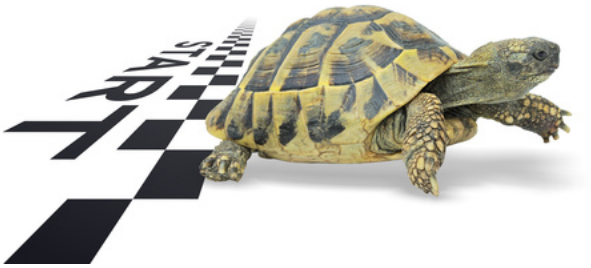
The CRM Marathon

- *by Raquel Lewis, CRM Success Consultant and Chris Fritsch, Client Success Consultant*

CRM is a Marathon, Not a Sprint

When considering a CRM system, you may think that this is a technology that simply needs to be purchased, installed and implemented… but, in reality, that couldn't be further from the truth. CRM is not a project, an initiative or a rollout. Rather, it's a fundamental change, and an improvement, in how your firm manages and leverages its relationships. These relationships are critical to the success of the firm – which makes CRM essential for firm success.

It can actually be helpful to think of CRM as a marathon – a continuous and integral part of your marketing and business development efforts. But, like any marathon, it's also important to understand that there can also be obstacles and roadblocks. Research by respected industry organizations indicates that up to 70% of all CRM implementations may fail to meet expectations, which can result in a significant loss of time, resources - and credibility.



The good news is that CRM success is possible! The key, as in any marathon, is preparation. Before the start of the race, there are a number of strategies you can employ to help you go the distance …

Plotting the CRM Course

Before embarking on your CRM marathon, it's important to plot the best course. To do this, it's helpful to determine where you are now. Successful CRM implementations begin with a comprehensive assessment of your current situation. Think about the reasons your firm needs a CRM in the first place. What problems are you trying to solve? What processes are you trying to improve? What are you trying to accomplish?

With the information you gather from your needs assessment, you can begin setting goals to measure your progress. For a firm new to CRM, goals could be as simple as creating a central repository of clean and complete contacts or building reliable mailing or event lists. For a firm with an established CRM that wants to enhance return on system investment, goals may be more sophisticated, like tracking business development activities and opportunities or supporting Client teams. No matter what your goals are, if you have identified them in advance, they will be your milestones of success.

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Keep in mind that while CRM can do a thousand things, you shouldn't try to achieve too many goals during the initial deployment. Instead, focus on three to five key goals that are measurable, achievable and agreed upon by key stakeholders. Save the rest for later down the road…

Cheerleaders

CRM should be a team sport. Trying to go it alone in implementing a CRM is not only painful, it's impossible. A number of key stakeholders should be drafted to help ensure success.

The Marketing team is critical for defining a CRM strategy and assisting in the planning, communication and training. They should work with CRM users to ensure the system provides value, helps build relationships and enhances business development efforts, rather than being perceived as a glorified Rolodex.

The support of the firm's IT department is also essential. Because they have traveled these paths before, they can help to spot potential obstacles and create a roadmap for avoiding them. Be sure to engage them early so they can catch their breath after all the other projects and implementations they may currently be working on.

Having firm management leading the charge is also essential. Without their support, your professionals may view CRM as just another distraction that uses up valuable billable time instead of a valuable business development tool. Leadership also plays an integral role in communicating to professionals why the firm cares about CRM and why they should care too. Leaders should set the vision, providing persuasive reasons for attorneys to use the system, such as:

- Identifying and leveraging relationships
- Minimizing repetitive or redundant processes
- Increasing efficiency and reducing costs
- Improving communication, coordination and Client service
- Enhancing business development

Additionally, including key end users on your team can go a long way in ensuring that you make it to the finish line. Many successful professionals care a great deal about their contacts and relationships, and developing business is a priority for many of them. Having influential attorneys in your corner can help to persuade others to cheer you on, and early adopters can provide critical feedback and suggest enhancements to improve the rollout.

Finally, a successful CRM implementation also requires the active participation of support staff including secretaries/administrative assistants. Because are frequently the ones using the CRM for the long haul, it is important to get their buy-in early. Their feedback can also be invaluable for streamlining processes and enhancing efficiencies. Make their lives easier and they will become some of your best cheerleaders.

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Coaches

It's impossible to win any race without a good coach. Not everyone has had experience rolling out a CRM system before. Many firms also lack adequate internal resources or have limited bandwidth. As a result, asking for help isn't just smart… it's essential.

There are a number of resources you can turn to for support and assistance. Your CRM provider can be a wealth of information. Colleagues at other firms who have rolled out a CRM in the past are also frequently willing to pass the baton and share tips and help you train.

As another alternative, you can engage outside consultants who can bring years of knowledge and experience and share best practices for success. A consultant-coach can play an essential role as a mentor and can also assist with strategy, planning, project management, communication, training and data quality. They can also play a key role in process improvement and change management. CRM implementations require a significant amount of user behavior change, so having a good consultant beside you during the race can really help you put your best foot forward.

Training for the Race

If you want to win any race, you have to train. For training to be effective, you need to start well in advance of the race and don't expect quick results. While inadequate training won't get you to the finish line, pushing too hard can end up being painful.

CRM training is essential for all users and requires training plans customized to the needs of key groups and individuals. Marketing users need to focus on essential tasks such as contact categorization and segmenting, list building, event management and report generation. The data team needs to focus on data quality tasks and best practices. Assistant training should focus on inputting and updating contacts, adding activities and adding contacts to lists. Attorneys need to be able to get correct and complete contact information and glean valuable insights from reports related to relationships and business development opportunities.

Training should also be targeted to the unique needs of key groups. While most individuals can be trained in groups with scenarios that are relevant to their needs, attorneys should be trained desk-side in brief intervals with information that is relevant to them. For instance, the contacts of new laterals could be added to the system to identify shared Client relationships with other attorneys. Introduction to those attorneys can aid in integration and lead to cross selling opportunities.

It's also important to remember that training must be ongoing, taking into consideration that CRM is not a project or initiative but rather a fundamental change – and improvement in how the firm manages its most important asset, it's relationships. Ultimately focusing on training will help to provide ongoing value to users which will enhance adoption.

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The Data Dash

Along the CRM implementation route, data quality issues are a common hurdle for every organization. Here's why: during a law firm CRM rollout, thousands of shared contacts quickly flow into the system from users. Some of these records contain incomplete or outdated information. Others are shared by multiple users, which will create a considerable number of duplicate records.

Attorneys are trained to notice errors, so if bad data is not addressed promptly, it will lead to distrust of the system. This is why preparing a data quality plan to manage user expectations from the start is essential. Adequate data quality resources must be engaged early, and the cleanup effort must be ongoing because data will continue to degrade over time.

Some firms also find it beneficial to incorporate incentives to encourage internal staff members to assist in the initial data cleanup before and during the initial rollout. Contests and rewards can get them engaged, and don't forget to leverage one of the great motivators in a law firm: food. Here are a few ideas:

- Breakfast / bagel breaks for meetings and trainings
- Brown bag lunch and learns or meetings
- Data cleansing cookie breaks
- CRM cocktail receptions or happy hours

Other incentives can be used to encourage participation from assistants and attorneys:

- For the data 'cleanup,' offer house cleaning services
- For enhancing contact 'details,' provide auto detailing
- For data 'massaging' such as deduplication or categorization, offer chair massages or massage gift certificates
- For 'boosting' contact information with industry, business or news information, offer coffee or gas gift cards
- For longer term projects, offer raffle tickets for achievement of incremental goals and award a valuable gift for the winner

While internal resources may help with the initial cleanup, many firms have now realized that they are not a viable long-term solution for data quality. Admin staff are not often trained in data quality and research and they typically have more pressing or even billable tasks to attend to. As a result, these strategic firms are relying on outsourced data quality professionals for initial and ongoing cleanup. Outsourced data quality professionals are trained in CRM, data quality and research skills and can often be engaged at a cost that is less than utilizing internal data staff – while eliminating the hiring, training and management headaches.

CRM Hurdles

To finish a CRM marathon, you will need patience and persistence. Honestly, almost no runner feels like getting up at 5 a.m. every day to hit the road, but real winners keep going. They know that if they persist, they can make it through to the finish line.

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They also understand that CRM implementations can be a long and winding road. While there will be many accomplishments, there will also be setbacks. Out of nowhere, a key staff person quits. A professional's new smart phone pours personal contacts into the database. The time and billing integration doubles the database with duplicates. A new software release corrupts your custom integrations. These types of roadblocks can make you start to feel winded or even consider throwing in the towel. But you have come to far now to turn back. To keep pace through the CRM roadblocks, you need to focus again on your plan. (Of course, having a good sense of humor doesn't hurt either.)

Start by thinking about the goals you set when you started and the progress you are making. What made you want to take on this CRM marathon in the first place? What did you want to accomplish along the way? For instance:

- Were there certain levels of CRM adoption you wanted to reach? Pick one key group that you know CRM can help and reach out to the leader to as a champion.
- Were you interested in improving mailing lists or event management? Focus on one communication or event list that is important to certain key stakeholders and get the data cleaned.
- Did you want to identify a certain number of relationships to enhance business development? Consider investing in an Enterprise Relationship Management (ERM) system to automatically capture contacts with minimal attorney effort.
- Do you have bad data? Get a Data Quality Assessment to assess the project scope and deploy part- time or full-time Outsourced Data Quality Professionals to help with the cleanup effort.

Just take the hurdles one at a time, slow and steady. Keep breathing and remember that each hurdle cleared gets you one step closer to the finish line…

Rest Breaks

When running a CRM marathon, you can sometimes because so focused on keeping up the pace that you forget to enjoy the scenery along the way. But if you sprint from the starting line at full speed, you can quickly lose steam. Instead, you need to maintain a steady pace – and it's ok to give yourself some breaks along the way to catch your breath.

Taking small breaks during a marathon can actually be beneficial. They give you a chance to get your bearings and appreciate just how far you have come. You may also need time to reassess priorities. Perhaps an unexpected technical issue has taken the IT team off track, or training users is taking longer than expected. While these issues can seem exhausting, you can work through them if you just take the time needed to determine the best course forward. Soon you will be patting them on the back and the finish line will be in sight...

The Finish Line

Once you have come such a long way on your CRM marathon, it's only natural to start looking for the finish line. You deserve a medal – or at least some sort of reward or recognition for getting this far, if nothing more than some rest and the satisfaction that comes from a job well done.

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Unfortunately, the problem with looking for the CRM finish line is your assumption that there actually is one. I hate to be the one to break it to you but the CRM marathon never ends. This is because CRM is not a project, an initiative or a rollout. It's a fundamental change – and an improvement – in the way your firm manages and leverages its most important asset: its relationships.

But don't be discouraged, this is good news. Because CRM never ends, you can pace yourself. Once initial milestones are achieved, you should begin to consider what the next priorities should be. There are also no set deadlines for implementing all the valuable features and functions. Instead you can focus on continuous improvement, achieving – and communicating - incremental successes. As your success in the CRM race continues, your system will become more and more ingrained in the daily workflow and culture of your firm.

When you look back on how far you have come, and each goal you have achieved along the way, you will realize that you have won the CRM marathon… without even breaking a sweat.

- *For more than 10 years, the team at **CLIENTS**First Consulting has been helping Professional Services firms and other organizations successfully select and implement CRM and eMarketing systems to maximize value, adoption and return on investment. If you need help with CRM, eMarketing, Data Quality, Data Privacy Compliance or Client Intelligence, contact us at 404-249-9914 or Info@CLIENTSFirstConsulting.com.*

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