



Bradley

A CRM, Data Quality & eMarketing Success Story

ABOUT BRADLEY

Bradley has more than 500 attorneys and nine U.S. offices which are located in Alabama, Florida, Mississippi, North Carolina, Tennessee, Texas and the District of Columbia, providing an extensive geographic base from which to represent regional, national, and international clients.

The firm's attorneys serve as national coordinating counsel, regional counsel and statewide counsel for clients in various industries. Attorneys and staff combine legal experience and knowledge with sophisticated understanding of industries to work side by side with clients and come up with practical, strategic solutions specifically tailored to their businesses and operations.

BACKGROUND

Bradley had attempted two previous CRM implementations without success. After conducting a thorough assessment of the firm's needs and requirements, a new CRM system was selected. It was branded "Bradley Connect" to encourage integration into the firm's culture and position it as the focal point for the firm's contacts and relationships. The goal was to ensure that this third CRM implementation was successful, was adopted by the firm's attorneys, secretaries and Marketing and provided real value and return on investment for the firm.

Describe the importance of CRM to achieving Bradley's marketing and business development objectives?

Bradley Connect allows the firm to identify and leverage relationships and provides the Marketing team with a central repository of reliable contact information that can be easily updated firm wide. Additionally, the team can efficiently create and update mailing lists for newsletters, alerts, event invitations or other email communications, ensuring that targeted recipients receive appropriate information in a timely manner.

What were some of Bradley's CRM and data quality challenges?

In past CRM implementations, there had been insufficient CRM training and communications for attorneys. Some attorneys did not know how to utilize the system while others were not even aware of the CRM. Additionally, data quality issues had resulted in the loss of trust in the CRM system by many attorneys.

Aware of the past challenges, Bradley's Marketing team was determined to ensure success this time. Early in the implementation, a significant data quality challenge was identified: the firm had a substantial backlog of contact information that required updating.

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Despite the efforts of a dedicated in-house data steward, literally hundreds of thousands of records had to be researched and corrected. Fortunately, firm leaders were committed to enhancing the data and ensuring that training and communication were a focus.

What drove the decision to use CLIENTSFirst Consulting?

CLIENTSFirst was engaged because of their experience in working together with hundreds of firms on successful CRM implementations, with the expectation that they would help Bradley define and implement a CRM success strategy and ensure that system data was clean, correct and complete.

How have the CRM, Data Quality or eMarketing resources or services at CLIENTSFirst contributed to Bradley's success?

CLIENTSFirst worked with Bradley's Marketing team to assess the firm's CRM needs and design and execute the firm's CRM and data quality strategy. During the CRM selection and implementation, the CLIENTSFirst CRM Consulting Team shared best practices and insights on what other firms were doing to succeed.

After the system was selected, a CLIENTSFirst strategy consultant was engaged to assess Bradley's needs and help ensure that the new CRM system would meet those needs, would be used by the attorneys and would provide return on the firm's investment.

During the implementation, CLIENTSFirst helped to create communications campaigns as well as rollout and training plans. Then CLIENTSFirst trainers helped to create training materials and provided desk-side instruction for attorneys and assistants, beginning with two pilot groups and then assisting in training the firm's trainers for the broader firm wide CRM rollout.

The CLIENTSFirst Data Quality Team researched and validated the firm's outdated contact information to ensure that Bradley's CRM data was clean, current and correct and helped to manage and organize the firm's email lists.

CLIENTSFirst Data Quality Consultants then helped Bradley to establish ongoing data management processes and find ways to work with the attorneys to resolve conflicting contact data. CLIENTSFirst is continuing to manage Bradley's data quality on an ongoing outsourced basis to help reduce costs and ensure that quality is maintained.

CLIENTSFirst eMarketing Consultants also helped Bradley transition to a new email marketing platform and understand and manage the integration of the system with Bradley Connect. Best practices were shared for using the system to ensure eMarketing successes.

Is there anything you wish to add regarding the resources or services provided by CLIENTSFirst?

Key leaders in the firm's Marketing team credit CLIENTSFirst for helping to deliver value throughout the CRM implementation, from strategy to data quality to rollout planning.

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The CLIENTSFirst team has been instrumental in ensuring Bradley Connect is successful. With support from firm management and an internal champion, we have been able to successfully roll out Bradley Connect and educate the users on its value.

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- *Jacqueline Madarang,
Senior Marketing Technology Manager, Bradley*



For more than a decade, CLIENTSFirst Consulting has been providing technology, consulting and intelligence solutions to help professional services firms enhance their marketing and business development efforts. We offer a complete portfolio of services including CRM and eMarketing Consulting, Data Quality Solutions and Client Intelligence to help our Clients grow and succeed.

Our team of almost 100 consultants and professionals share one common goal: to provide our Clients with unparalleled services and service.

For us, putting Clients first is not a philosophy...

It's who we are!