

The Benefits of CRM Integrations

- By Chris Fritsch, CRM Success Consultant

Even though the entire law firm business model is built around forging long-term relationships and connections, there probably is no other industry with more disconnected systems and data. Legal marketing professionals and technologists are constantly struggling with the challenges caused by juggling so many disconnected systems including CRM and ERM, eMarketing systems and blogs, websites, intranets and portals, experience databases, proposal generators, social listening and competitive intelligence tools and more. And don't even get me started on the spreadsheets. All of this can lead to a significant number of people and processes issues.



When, Where and Why to Integrate CRM

When systems are not connected, it causes challenges such as vast sets of duplicate contacts and duplicative data entry. Attorneys and staff waste time on inefficient tasks such as entering data into multiple disconnected systems, which is frustrating and time-consuming – and a real problem for professionals who make money by billing their time. These independent 'silos' of data can also keep attorneys from being able to effectively analyze this disconnected data to make informed, timely decisions.

One frequent solution to these problems is to build a bridge to connect the disparate systems and allow for enhanced information flow as well as efficiencies—aka integration. But then a more pressing question becomes where to build the bridge. One answer for many firms has been the Client Relationship Management (CRM) system. A CRM has many qualities that make it a good option. These systems have been around for a long time, and many firms have already made significant investments in them. More important, a majority of firms have deployed the software to the desktops of all or most of their attorneys. Plus, a potential benefit of enhancing the data in the CRM can be to drive adoption of the CRM, which is a goal for many clients.

While it's important that integrations facilitate the flow of useful information, it's also important that they be able to stand the test of time. Building integrations are often costly, so it's important that there is potential for a return on the technology investment. For instance, frequently a client assumes that a financial integration should be part of the initial implementation of a CRM system, without first doing a cost-benefit analysis. As a result, when we work with clients who suggest this – or any technology integration – we always ask one simple question: "Why?" If you can't articulate a reasonable and well-thought-out answer to the question, it's likely that the integration may not be necessary – or at least may be better left to a later phase of the CRM implementation.

Involve Key Stakeholders

Too often these decisions are made without input from all the key stakeholders. Here is a case where that error had a major impact on a CRM implementation: A firm that we worked with was focused on creating an opportunity pipeline that the Marketing department could use to project future revenue and help staff upcoming projects. Meanwhile, the firm's IT department was in the middle of a time and billing upgrade, and to get the firm to purchase the time and billing software, the consultant had offered the firm a 'free' CRM system that could integrate with it to let data flow into the opportunity pipeline. However, because Marketing was not involved in the initial system needs assessment or purchase, when it came time to set up

the pipeline, the CMO realized that the finance department was entering data during the intake process in a completely different manner than the Marketing and Business Development teams needed to be able to report on the data in the pipeline. As a result, both projects had to be halted for several months of meetings so that everyone could agree on a consistent format and taxonomy.

CRM Integration Options That Add Value

So, what are some of the more beneficial CRM integrations when it comes to legal marketing technology? Here are a few:

- **eMarketing Data:** The value of a CRM system can almost always be enhanced by the integration of an eMarketing system. This can be extremely beneficial to bring in analytics and potential business development activities gathered from email campaigns and events. Often, these integrations have already been built by the system providers, offering cost savings as well. As an added benefit, enhancing the CRM system with this collected eMarketing data can drive system adoption and value, which most firms struggle to achieve.
- **Time and Billing Data:** CRM can also be tied to the time and billing system. Many firms have done this in the past, and while the cost may be more than some other types of integrations, if a firm has a common time and billing and CRM system, it's usually not prohibitive. Some data that can be beneficial to bring to the CRM includes things like client information, ranks and numbers. Additionally, if the IT department has added industry information to the billing system, that data can be beneficial for targeting and segmenting lists in the CRM. How many marketers struggle when asked by an attorney, "Why can't we just pull a list of our <insert industry name here> clients and prospects for the industry seminar we are doing?"
- **External Data Sets:** External data sets can also be connected to key firm systems. Company news and information and industry codes can be brought into the CRM and connected to company contacts. This type of connection can be beneficial, but it often requires a meticulous initial matching process and ongoing subscription costs for the information to prevent it from becoming outdated. Be sure to think carefully about whether you want to go beyond marketing uses and provide the information directly to the attorneys. Information changes frequently and is never perfect, and often an attorney will be turned off by discrepancies in the data. Trained to find fault, attorneys will often conclude that if the data is bad, therefore the system is bad, and this can discourage use of the system.
- **HR Data:** Integration of the firm's HR system can also provide value. Automating the creation of user accounts in the CRM offers efficiencies. The HR data can also be used to feed firm directories and provide computer or mobile access to key firm personnel information. Attorneys can also be related to clients, matters, experience or opportunity records.

Focusing on integration strategies can provide a firm foundation for CRM success. However, this is only the first step. The more critical step involves dealing **with** the people and process issues and change management challenges that are inherent with CRM – which is where many firms fall short. For assistance with any of these areas, feel free to [contact](#) the team at [CLIENTSFirst](#). Our team of almost 100 consultants and other experienced professionals have helped hundreds of firms achieve CRM success.

- For more than 12 years, the team at [CLIENTSFirst 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 Success, please contact us at 404-249-9914 or Info@ClientsFirstConsulting.com.