

Top Tips for Effective eMarketing & List Management

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Being able to effectively communicate with clients and contacts over email has become a priority for many firms – especially now that that in-person live meetings and events are essentially dead for the foreseeable future. As a result, it's more important than ever to focus on processes and technology for effective list management and email communication.



Oversaturation

Currently our contacts are drowning in a deluge of marketing communications and being inundated with invitations to webinars and virtual meetings and events. It won't take long for them to escape by hitting the 'unsubscribe all' button – so it's essential for firms to effectively manage their lists to ensure that key contacts get the information they need but are not oversaturated with unnecessary or irrelevant content. The following are some top tips on email list management we have compiled while working together with hundreds of firms to help them successfully select and implement eMarketing and CRM systems.

Define Your Goals

For first-time list creation, it is easy to get carried away with all the segments you *could* have rather than focusing on what you actually need. You don't have to have granular data on every contact from the outset. Start by looking at the mailings you are sending out currently and clearly define your must-have segments versus those that would be just nice-to have. By clarifying the problem you are solving for in the present, as opposed to what you want in the future, establishing segments becomes an iterative process which, over time, can break the information-gathering into a series of smaller tasks that will reduce the burden on the professionals and their assistants. For example, you do not need to send your professionals a three-page questionnaire on each contact when your current mailings really only fall under four or five categories. Keep it realistic, not aspirational.

Define Your Lists

To start with, segmented lists can be created to coincide with top-level practice areas. Look at what the firm frequently publishes and how those pieces are organized on your website. While you may have a number of esoteric sub-practices, chances are that they may be included under broader, more recognizable top-level practices. Those should be your primary mailing lists.

Don't Over-promise

It goes without saying (but we are saying it anyway for emphasis), having a mailing list implies that you actually have mailings. If only one or two practices regularly produce content and/or events, then those are the lists you need to start focusing on. It can actually be counterproductive to have people subscribe to publications expecting to receive content that never comes. On the other hand, professionals can be a bit competitive by nature, and if some of the non-active practices see all the great content that others are producing – and the new clients they are developing – you may soon find them at the door of the Marketing department wanting to start writing.

Communication Is Key

Professionals sometimes assume, often incorrectly, that simply adding a contact to the Marketing database means that their contact will start to receive content. In most firms that isn't the case, but if they believe it is, they may be hesitant to share their contacts for fear that they will get “spammed” with irrelevant firm communications.

If your firm doesn't automatically add contacts to lists, be sure that this is communicated to the reassure the professionals that it's safe to share. But also make sure that the importance of adding contacts to lists is communicated and professionals are trained to include which segments or lists a new contact should be put on. It can also be helpful to engage the assistants to help the professionals with this endeavor as they are often the ones who regularly enter or update the contacts.

If your firm does include new contacts in certain mailings, it's important that the attorneys understand the reasons why and the methodology that is used. It's also important to provide a process they can use to keep any sensitive contacts off of lists if necessary.

Leading by Example

Having the support of firm leadership is an essential element of eMarketing success. Internal communications should come from firm leaders supporting the importance of sharing contacts, assisting with list management and utilizing firm technology, such as the CRM system, to support the process. Regular follow-up communications with statistics on participation and list size should also be distributed to encourage ongoing participation. Remember, CRM and email marketing never really “end.” The good news is that means you've got forever to get better at it.

Have Some Fun

Appealing to the everyone's competitive nature by gamifying the list management process can also be productive – and fun. Come up with a contest to see who can share the most relevant contacts into the CRM and/or add relevant participants to key lists. We worked with one firm that had great success by using this idea and giving away prizes for participation. The professionals were broken into groups by office or practice and the desired metrics were tracked in shared dashboards. But the real key to participation was that no one could win without 100% participation of the professionals in the group. Way to leverage that peer pressure!

Make It Easy

One of the goals for CRM adoption is to make sure that participation is as easy as possible and doesn't create a lot of additional work. In fact, ideally the goal should be to make things easier. To this end, it's helpful to create some supporting documentation.

One key instructional instrument is a [firm style and standards manual](#) to guide system users in how to enter information consistently in the CRM, which improves searchability and contributes to improved data quality by reducing the creation of duplicate contacts. The guide can be created in consultation with key assistants or other individuals who currently are responsible for entering data into firm systems and are familiar with existing processes, which has the added benefit of helping to get them engaged in the process – and the technology.

You can also create a quick reference guide that defines the minimum required information for creating a contact record in the CRM system. Ideally, that information would include the first and last name, email address, job title and company. Some firms find that additional information such as mailing address or phone numbers can also be helpful - but be aware that increased information requirements sometimes come at the cost of compliance.

Additionally, you may want to create a template for adding contacts to lists to accommodate attorneys who prefer to review lists and add contacts manually (yes, there will always be a few). Start by assigning a number to each of your lists. This makes it easier for the professionals or their assistants to review a spreadsheet of their contacts and quickly add the relevant numbers, instead of repeatedly writing out a list name. It also helps to avoid confusion if you have lists with similar names or when list names inevitably change. Then create a spreadsheet template with column headers and a place to add list numbers so professionals and their assistants know exactly what information they need to provide.

Give Them a Head Start

Instead of expecting them to start from scratch, provide your busy professionals with a pre-populated list to make things easier and enhance participation. Take a first pass at categorization by associating the contacts to sample lists based on related practices. For instance, take the contacts contributed by the professionals in a key practice and add them to a practice area list. Then submit it to the practice or professionals for a final review before sending communications. Not only will this save them time, but it will also typically result in a more comprehensive list.

It can also be helpful to categorize your lists – either manually or automatically. For instance, you may want to add industry codes or information to key companies. In the CRM, those companies are typically tagged to individual contacts who can then be added to industry distribution lists based on their assigned company. But be sure not to confuse industries, which are added to company records, with areas of interest, which are assigned to people records.

Data Privacy

The time to address compliance with data privacy regulations is now. Start by having conversations with your firm's general counsel to define your data privacy compliance policy and procedures. There are a multitude of regulations in place around the world that your firm may want to consider when deciding what compliance will entail.

The European Union's General Data Protection Regulation (GDPR) is widely considered to be the "gold standard" since compliance with this stringent regulation typically covers the requirements of other regulations. GDPR dictates that you must have the contact's consent to hold their data and subsequently send them emails.

Most eMarketing providers have built-in tools and methods to track and comply with consent requirements, but it is up to you to ensure that those options are available and get utilized. Bear in mind that it will be easier in the long run to establish consent procedures early in your email list creation process than to retroactively apply them down the road.

One option to consider is having a welcome email sent to contacts with a link to a preference or subscription page on the website that lists available email publications and invitations and captures the electronic consent when contacts add themselves to a lists. This captured consent is recommended or required by some privacy regulations.

Also consider implementing a secondary 'high-touch' process for high-value contacts such as new clients where the professional working with the client sends a personal email with a link to the preference or subscription page. These types of consent requests may get a better response since the email is coming directly from the person they know and trust, as opposed to an automated, system-generated email.

You will also need a mechanism/process to ensure that the professionals do not override the contacts'

preferences. For example, if a contact takes themselves off a practice area list, a professional should not be able to add them back onto the list. The process for achieving this will vary depending on your eMarketing program, but common solutions include establishing exclusion or 'anti-lists.' It's also important to have a way to view contacts who have unsubscribed or asked not to receive communications from the firm so that people don't try to add them to lists.

It may also be time to review the all-to-common practice of allowing professionals to randomly assign contacts to mailing lists. While this may not violate privacy regulations for U.S. contacts currently, the process should be thoughtfully considered in the wake of a plethora of new privacy laws. A better solution may be to allow professionals to send new contacts an email that has a link to the firm's subscription page to allow the individuals to choose what they want to receive. This will allow the firm to capture the electronic consent and may even result in the contacts subscribing to multiple publications. Analyzing this subscription data could also lead to the identification of cross selling opportunities.

For more comprehensive information on data privacy, see [this article](#).

Other considerations for establishing and maintaining lists

Here are a few more list management best practices we've gathered while working together with hundreds of professional service firms to help them achieve CRM and eMarketing success:

- DO categorize competitor firms for establishing an exclusion list to keep them from inadvertently receiving communications or invitations
- DO regularly review and research bounces to update their contact information and/or remove them from lists
- DO regularly monitor and report on contacts who are not on any mailing lists
- DO track which professionals have relationships with the contacts
- DO NOT allow individual lawyers to circumvent or override firm data privacy policies
- DO review the contacts of attorneys who leave the firm and who are on mailing lists
- **MOST IMPORTANT:** DO NOT hesitate to ask for help. CLIENTSFirst has been helping professional services firms achieve success with eMarketing, CRM and related and integrated marketing technologies and strategies for 15 years.

Contact us for a free 30-minute consultation with one of our CRM & eMarketing experts.

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