CRM Benefits for the Firm and Users

Despite the significant value that a CRM system can provide, firms often struggle with adoption because they are unable to get groups of stakeholders to regularly use the system. The key to CRM adoption is to provide value – not only for the firm, but also for individual users. Each group of users must see what's in it for them. How will it help them save time, solve problems, automate processes, strengthen relationships, develop business or grow revenue. The following is a list of some of the most common ways that CRM can provide value to different groups of users in the firm.

Value CRM can Provide to the Firm

- Improved communication and list management

- Improved coordination in touches with Clients and prospects

- Enhanced Client service

- Reduction in embarrassing communications being sent to deceased or former Clients

- Preventing the invitation of adversaries or competitors to firm events

- Improved event management

- Improved processes

- Better referral tracking

- More opportunities to cross sell

- Improved Client retention

- Experience tracking for pitches and RFPs

- Tracking of marketing activities with key contacts

- Ability to segmenting contacts for targeting of communications

- Ability to keep you with relationships with firm alumni

- Tracking of marketing and business development activities

- Tracking of marketing expenses

- Ease of ensuring that contacts who unsubscribe from publications will be removed individual lists

- Allowing for better tracking of attendance at events to avoid cost overruns

- Ensuring duplicative publications are not sent to contacts

- Ensuring communications are not sent to deceased contacts

- Allowing contacts to be removed from individual lists rather than all of the firm's publications

- Ensuring communications are not sent to contacts who have asked not to receive them

- Ensuring competitors are not invited to firm events

Value CRM can Provide to Attorneys

- Complete and correct contact information can be updated firm-wide

- Reduced time spent reviewing lists

- Less time spent on redundant tasks

- Reduced time spent entering new contacts

- Quick access to correct information

- Ease of adding new contacts to lists

- Activity tracking with key contacts

- Information on contacts automatically updated with changes

- Ease of reviewing marketing and event lists to see who is receiving communications and invitations

- Who knows whom relationship intelligence - ease of identifying other attorney and staff relationships for business development

- Less time spent reading and responding to redundant communications regarding who knows who and attorney expertise

- Automation of repetitive, redundant and / or paper based processes

- Ensuring duplicative publications are not sent to contacts

- Ensuring communications are not sent to deceased contacts

- Allowing contacts to be removed from individual lists rather than all of the firm's publications

- Ensuring communications are not sent to contacts who have asked not to receive them

- Ensuring competitors are not invited to firm events

- Accurate tracking of attendees at firm events to facilitate follow up

- Reduction in time spent submitting expense reports for reimbursement of marketing expenses

- Improvements in Client service

- Integration and leveraging of lateral hires and new attorneys

- Enhanced opportunity tracking and reporting

- Improved access to essential business development information

- Enhanced cross selling opportunities

- Enhanced understanding of Client business and industry

- Improved communication of attorney experience and expertise to targets and prospects

- Improved ability to have experience information available to other attorneys for cross selling

- Less time spent dealing with the holiday card

Value CRM can Provide to Assistants / Secretaries

- Reduced time spent reviewing lists

- Improved quality of contact information

- Less time spent on redundant tasks

- Automation of repetitive, redundant and / or paper based processes

- Reduced time spent entering new contacts

- Reduced time to access information

- Ease of adding new contacts to lists

- Complete and correct contact information can be updated firm-wide

- Information on contacts automatically updated with changes

- Ease of reviewing marketing and event lists to see who is receiving communications and invitations

- Reduction in time spent submitting expense reports for reimbursement of marketing expenses

- Ease of entering new contacts into firm systems

- Integration with Word to create letters and do mail merges

- Enhanced reporting functionality to support attorneys

- Less time spent on dealing with the holiday card

Value CRM can Provide to IT / IS

- Reduction in the number of repetitive databases requiring management / attention

- Single point of storage / access

- Standardized platforms

- Enhanced reputation from sharing in successes

- Perception as business development / revenue generator

These are only a few examples. The best way to identify the most compelling ways to increase CRM adoption in your firm is to do a needs assessment with key groups and individuals. CLIENTSFirst has helped hundreds of firms assess their needs and enhance CRM success. Feel free to reach out to us for more information about our CRM Success Assessment.