

Committed to the Growth of Our Clients



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CRM and E-mail Marketing Not Sexy, But Essential

Prepared For



A Little About Us

Christina R. Fritsch, JD

CLIENTSFirst Consulting

- CRM Success Consultant / Legal Technologist
- Recovering attorney
- Over 10 years experience working together with more than 300 top law firms across the country

A Little About Us

Jasmine Trillos-Decarie
(@JasmineDecarie)

Foley Hoag

- Director of Marketing & Business Development
- Sucker for punishment: 20 years, 3 firms, AmLaw 25, 50 and now 200
- Focused on the development of content marketing to drive business development
- Firm believer in the need to execute individual attorney branding alongside firm branding

A Little About Us

Corey Cooper

Knobbe Martens

- Sr. Business Development Coordinator
- Uses inquisitive nature to challenge assumptions and improve firm processes and work flow procedures and lead the firm through its first CRM software adaptation.

A Tale of Two Law Firms

■ Sizes

- ☐ 250 Professionals
- ☐ 275 Professionals

■ Systems used

- ☐ InterAction
- ☐ ContactEase

■ E-mail tool used

- ☐ Tikit / Vuture
- ☐ Saturno

■ Length of implementation

- ☐ 5+ years
- ☐ <1 year

■ CRM Goals

- ☐ Get people to trust the current system
 - Get attorneys and content in front of the right audience
 - Move from marketing to business development
 - Track, share and analyze data
- ☐ Acquire and implement a new system
 - Relationship intelligence
 - Getting buy-in
 - Efficiency
 - E-mail marketing / lists



Survey Results: What You Told Us

Survey

■ What topics related to CRM and e-mail marketing do you most want to learn about

- ☐ What CRM is and how to use e-mail for marketing
- ☐ What firms are using beyond InterAction
- ☐ Teaching lawyers to segment lists
- ☐ How LinkedIn is factoring in
- ☐ How to get buy-in
- ☐ Hot button issues
- ☐ Event management
- ☐ Managing unsubs
- ☐ Design integrity
- ☐ Advertising laws
- ☐ Analytics
- ☐ Staffing
- ☐ Work flows

Survey

■ How many attorneys are in your firm

☐ 15

☐ 45

☐ 140

☐ 175

☐ 200

☐ 275

☐ 420

☐ 600+

☐ 750

☐ 2400

☐ service providers

Survey

- Which CRM system do you use
 - ☐ InterAction
 - ☐ ContactEase
 - ☐ Sugar
 - ☐ Zoho
 - ☐ Access
 - ☐ Outlook

Survey

- What method or tool do you use for e-mail and event marketing
 - ☐ Vuture
 - ☐ Tikit /Reaction Server
 - ☐ Concep
 - ☐ ExactTarget
 - ☐ Hubspot
 - ☐ Haven't used e-mail for marketing

Survey

- Who uses the CRM system or has access to it (check all that apply)
 - ☐ Marketing - 100%
 - ☐ Partners - 72.7%
 - ☐ Associates - 72.7%
 - ☐ Secretaries - 63.6%
 - ☐ Paralegals - 45.5%
 - ☐ No one – 0%

Survey

- What types of activities or initiatives does your CRM and/or e-mail marketing system support?
 - ☐ External communications - 100.0%
 - ☐ Internal communications - 72.7%
 - ☐ Event management - 90.9%
 - ☐ Business development - 72.7%

Survey

- On a scale of 1 to 5, how would you rate the quality of the contact data in your system
 - ☐ A hot mess -16.7%
 - ☐ 8.3%
 - ☐ Somewhere in the middle - 58.3%
 - ☐ 16.7%
 - ☐ Clean, comprehensive and correct - 0.0%

Survey

- How would you describe your current CRM implementation (check all that apply)
 - ☐ Shelfware 0.0%
 - ☐ A complete waste of time/money 0.0%
 - ☐ A glorified Rolodex 45.5%
 - ☐ A basic list and event management tool 36.4%
 - ☐ A Client communication tool 36.4%
 - ☐ An essential business development tool 45.5%



CRM and E-Mail Marketing: *- What We'll Cover*

CRM Agenda

- CRM Tools
- What CRM Can Do vs. What It Should Do
- CRM Challenges
- How to Achieve CRM Success
- CRM By the Numbers
- Thinking Outside the Box
- Integration and Automation
- Business Development Aggregation and Analysis
- Breakout

E-mail Marketing Agenda

- What E-mail Marketing Is and Why It's Important
- E-mail Marketing Tools
- E-mail Marketing Challenges and How to Succeed
- Testing and Metrics for E-mail Marketing Success
- Mobile Marketing
- SPAM and Privacy
- Event Marketing
- Internal E-Mail Marketing
- Getting Return on CRM and E-mail Marketing Investments
- Q/A

Growing Relationships

For Business Development and CRM Success



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CRM Tools



Legal Industry CRM Providers

- ContactEase
- InterAction
- Contact Manager / Business Development Premier
- CRM4Legal (Microsoft Dynamics)
- IntelliPad

Other CRM Options

- The Cloud
 - Salesforce
 - Sage, Sugar, Zoho, Act
- Homegrown systems
- Other tools
- LinkedIn



What CRM Can Do

- *Versus What It
Should Do*



What CRM Was - CRM 1.0

- A database
- A marketing tool
- List and event management
- Marketing activities
- Relationship intelligence / who knows whom
- A 'really expensive mailing list'
- A year (or more) of your life

What CRM Should Be

- A communication tool
- A Client service tool
- An information delivery tool
- A cost reduction tool
- A process automation tool
- A business development tool
- An internal communications tool
- A fundamental change – and improvement –
in how your firm manages relationships

CRM Can Do a Thousand Things

- List management
- Event management
- Relationship intelligence / Who knows whom
- Targeting / segmenting
- Reminders / alerts
- Watch lists
- Activity tracking
- Referral tracking
- Alumni tracking
- Opportunity tracking
- Information / data delivery
- Advanced reporting
- Client team support
- Cross selling support
- Improved Client service
- Expense tracking
- Identification of top or at risk Clients
- Who knows what (expertise tracking)

But It Should Probably Do Only 3

The Rest are Just Bells and Whistles



Do you know what those top
3 things are in your firm?

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CRM Challenges



The CRM Challenge

- According to respected business research organizations, up to 70% of CRM implementations failed to meet expectations - resulting in a tremendous loss of money, time, resources - and credibility

Biggest Complaints

- It's an overpriced or glorified rolodex
- The 'lawyers' won't / don't use it
- Lawyers don't want to share
- Training / communication
- Bad data / data cleanup
- Software, support or service issues

Reasons for CRM Failure

- The most common reasons for CRM failure
 - Lack of buy-in from management
 - Failure to commit necessary resources
 - Lack of input or buy-in from key user groups
 - Lack of strategy or planning
 - Attorney perceptions of CRM as a marketing 'toy'
 - Data quality issues
 - Misguided or unrealistic expectations
 - Data quality issues

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How to Achieve CRM Success



The Good News

- Success is possible!
 - It can often be accomplished without having to spend a lot of money
 - It's actually more about the people and process than the technology

People

- Get stakeholders and end users involved early and often
- Gain management / leadership support
- Create a pilot group
- Know staffing requirements
- Get feedback –
and implement it
- Communicate successes
- Know if there anyone who
won't 'play nice' in the
CRM sandbox



Firm Culture

- Packaging costs
- Thoughtful and strategic implementation
- Internal marketing campaign & themed collateral
- Focus groups
- Motivational program throughout; focused on assistants

Process

- How will participation be encouraged
- How will information be communicated
- Who will enter the information
- Are there redundant or repetitive processes that can be automated
 - How many times is data being keyed currently
- How will contacts be categorized
- Do you need business development rules of engagement
- If tracking referrals, who will enter them
- How will the data be cleaned
- What data should be tracked or reported

Considerations

- Can things be mandated?
 - If not, can they be automated?
 - Integration with other systems
 - Automated data feeds
 - SIC or NAICS codes
 - Or outsourced
 - Outsourced data quality
 - Enhancing information with company or industry information
 - Adding existing CI data to records



Top Down vs. Bottom Up - and Everything in Between

- Every firm has it's own style
- Three firms with InterAction all of which were very different
- Which do you think is better?
 - ☐ Top Down?
 - ☐ Bottom Up?

Everything in Between



CRM Must Be a Team Sport

- Partner with IS/IT
 - Their assistance is required
 - They can support you
 - They are used to negotiating software contracts
 - They understand the hardware and software requirements
 - They understand integration and security issues



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CRM by the Numbers...



Negative Numbers

- Opportunity costs
 - Billable hours wasted
 - Poor attendance at expensive events
 - Postal mailing costs
 - Repetitive and redundant processes
 - Attorney time spent on list management
 - Inability to target and segment and ensure information gets to the right audiences
 - Dollars wasted on non-strategic activities
 - Sponsorships

Positive Numbers

- Automation of Manual Processes
 - 70% of holiday cards done by August (150% improvement in participation from previous years)
 - 225% average increase in event attendance
 - Conservatively, \$14,000 per event in billable attorney time saved
- Refinement of Event Invite Leads to Bus Dev
 - Fast and effective cleanup of existing list & ability to target ideal additions
 - 45% drop in no-shows
 - Location evaluation based on historical attendance allowed for a move to cheaper venue
 - Client who had not been invited in the past attended or hired us in this area came and gave the group work

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Thinking Outside the Box



Forget 'Out Of the Box' Solutions

- Customize
- Configure
- Enhance
- Integrate

Additions, Enhancements

- RFP and pitch tracking
- ERM
- Online contact information verification
- Mobile
- Online event RSVPs and surveys
- Opportunity tracking
- Event management

ERM

Colleagues (Showing 20 of 166)
 Filter Results By Filter

- Khalil A McAdams**, Of Counsel
- Harry E Kimmel**, Partner
- Nick Schmidt**, Partner
- Harry L Stankard**, Associate
- Troy Lai**, Managing Partner
- Matthe R Helton**, Partner
- Keith Perez**, Partner
- David A Unsworth**, Associate
- Lauren Ryan**, Partner
- Jackie F Moore**, Associate
- Ben Sexson**, Legal Specialist
- Steven Kelly**, Associate
- Chandler S Skelly**, Associate
- Tony S Drew**, Partner
- Drew Rodriguez**, Legal Assistant
- Pablo Menéndez D Álvarez**, Of Counsel
- Tanyon Amador**, Associate
- Chris G Savage**, Associate
- Bruce M Miles**, Partner
- Florentino Carreño M Vicente**, Partner

[See More](#)

Contacts (Showing 20 of 455)
 Filter Results By Filter

- B. Nulman Michael**, Senior Counsel, CVS Realty Co.
 Email: mbnulman@cvcs.com
 Phone: (401) 770-2533
 Work Address: One CVS Drive, Woonsocket, RI 02895

Relationships to B. Nulman Michael
Harry E Kimmel, Partner
Chandler S Skelly, Associate
Khalil A McAdams, Of Counsel
Harry L Stankard, Associate
Troy Lai, Managing Partner
Nick Schmidt, Partner
David A Unsworth, Associate
Lauren Ryan, Partner
Jackie F Moore, Associate
Ben Sexson, Legal Specialist
[See More](#)
- Diane Glass**, Esquire, CVS Corporation
- Brenna Jordan**, Esq., CVS Corporation
- Tim Kramer**, Senior Legal Counsel, CVS Realty Co.
- Robert Holtzman**, Deal Manager, CVS Corporation
- Robert Sampson**, Deal Manager, CVS Realty Co.
- Robert Lankowsky**, Vice President, General Counsel and Secretary, CVS Corporation

Contact Verification

From: Law Firm Name
To: Chris Fritsch
Cc:
Subject: To our Clients and Friends

To help us stay in touch with you, please verify your contact information that is included in the data box below.

Managing Partner

Law Firm Name

www.lawfrm.com

800-555-1212

If you have any questions regarding this email, please contact our marketing director at contact@lawfrm.com

Chris Fritsch JD
Regional Director

Clients First Consulting
892 Durant Place NE
Atlanta GA 30309
United States of America

CF@ClientsFirstConsulting.com
www.ClientsFirstConsulting.com

direct:
company: (404) 249-9914
cell:

Edit

Confirm

Clean Up Contacts in Outlook

☐ Outlook Contacts - Jeff Reade (Jeff)

View all contacts

	Synch	Modified	Created	FileAs	Company
1	<input checked="" type="checkbox"/>	7/20/2009 10:	1/11/2008 1:3	Aballé, Cheryl	Anderson Ma
2	<input type="checkbox"/>	6/11/2009 1:1	1/11/2008 2:2	Adams, Mark	Anderson Str
3	<input checked="" type="checkbox"/>	12/9/2008 10:	1/14/2008 2:5	Anderson Ma	Anderson Ma
4	<input checked="" type="checkbox"/>	7/20/2009 10:	7/20/2009 10:	Baer, Mike	Accenture
5	<input type="checkbox"/>	2/9/2009 10:3	1/11/2008 2:2	Brown, John	Anderson Ma
6	<input type="checkbox"/>	7/20/2009 3:2	1/11/2008 2:2	Brown, John	Anderson Tully
7	<input type="checkbox"/>	12/9/2008 2:3	9/9/2008 2:21	Contact, New	Anderson Ma
8	<input checked="" type="checkbox"/>	7/20/2009 10:	7/20/2009 10:	Frank, Joe	Anderson Ma
9	<input type="checkbox"/>	12/9/2008 2:3	1/14/2008 2:5	Gehrke, Wern	Archer Norris
10	<input type="checkbox"/>	6/17/2009 2:1	5/27/2008 12:	Groman, Pete	Carrington Co
11	<input checked="" type="checkbox"/>	7/20/2009 10:	1/14/2008 2:5	Halleman, M	Thompson Co
12	<input type="checkbox"/>	3/6/2008 4:53	1/11/2008 2:2	Heyen, Micha	Anderson Tully
13	<input checked="" type="checkbox"/>	5/27/2008 12:	5/27/2008 12:	Jay, Mel	Inkmarks
14	<input checked="" type="checkbox"/>	5/27/2008 12:	5/27/2008 12:	Jimmerson, J.	Inherent.Com, J.
15	<input type="checkbox"/>	5/14/2008 11:	1/11/2008 2:2	Jones, Bob	Anderson Ma
16	<input checked="" type="checkbox"/>	5/27/2008 12:	5/27/2008 12:	Jones, Chuck	Wendel Rose
17	<input checked="" type="checkbox"/>	7/20/2009 10:	7/20/2009 10:	Jones, Jeffrey	Washburn, Br
18	<input type="checkbox"/>	6/23/2009 12:	9/9/2008 2:21	Jones, Joe	Anderson Sm
19	<input checked="" type="checkbox"/>	7/20/2009 10:	7/20/2009 10:	Jones, Joe	Anderson Sm
20	<input checked="" type="checkbox"/>	12/9/2008 10:	5/27/2008 12:	King, David A	Appleby, Spu
21	<input checked="" type="checkbox"/>	5/27/2008 12:	5/27/2008 12:	Lindbjerg, Ole	WURTH DAN
22	<input checked="" type="checkbox"/>	1/14/2008 2:5	1/14/2008 2:5	Love, Tina	Archer Norris

☐ Merge Contacts

These two contacts will be merged. The changes you make will be merged into the record on the left. Checking both fields will combine the values. Fields in red cannot be combined.

Double click on a row to view field details.

View differences

View differences

View all

Swap the contacts

	Not Synchronizing CVSCEID:248825816642905	Not Synchronizing CVSCEID:70717599644071
Title	<input type="checkbox"/>	<input checked="" type="checkbox"/> Mr.
Job Title	<input type="checkbox"/>	<input checked="" type="checkbox"/> Controller
Company	<input checked="" type="checkbox"/> Anderson Tully Co	<input type="checkbox"/> Anderson Manufacturing Inc.
Note 1	<input checked="" type="checkbox"/> PHNS FIELD SRCH 2/10/97	<input type="checkbox"/>
E-mail	<input type="checkbox"/>	<input checked="" type="checkbox"/> jbrown@andersonmfg.com
Business Address	<input checked="" type="checkbox"/> 1242 N 2nd St	<input type="checkbox"/> 236 Potomac Street
Business Phone	<input type="checkbox"/>	<input checked="" type="checkbox"/> (504) 289-5000

Copy

Merge F2

Cancel

Record 1

Copy

Archive...

Repair...

Merge...F2

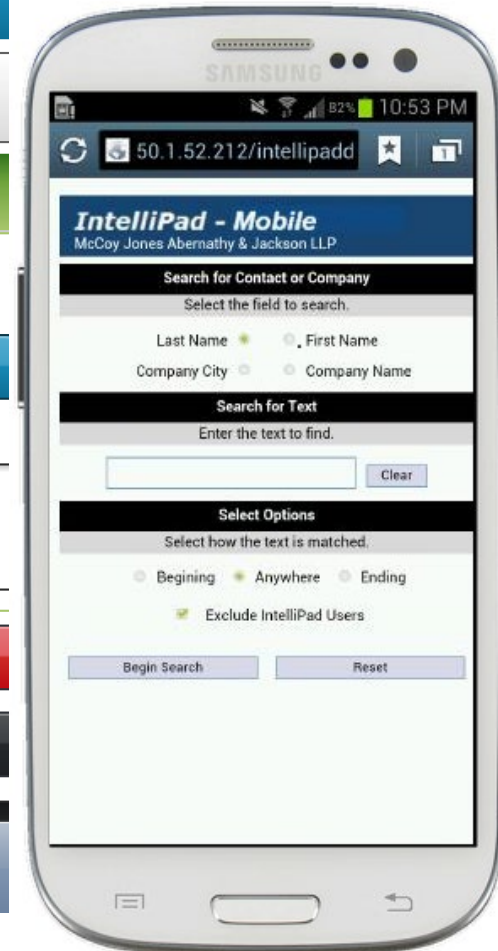
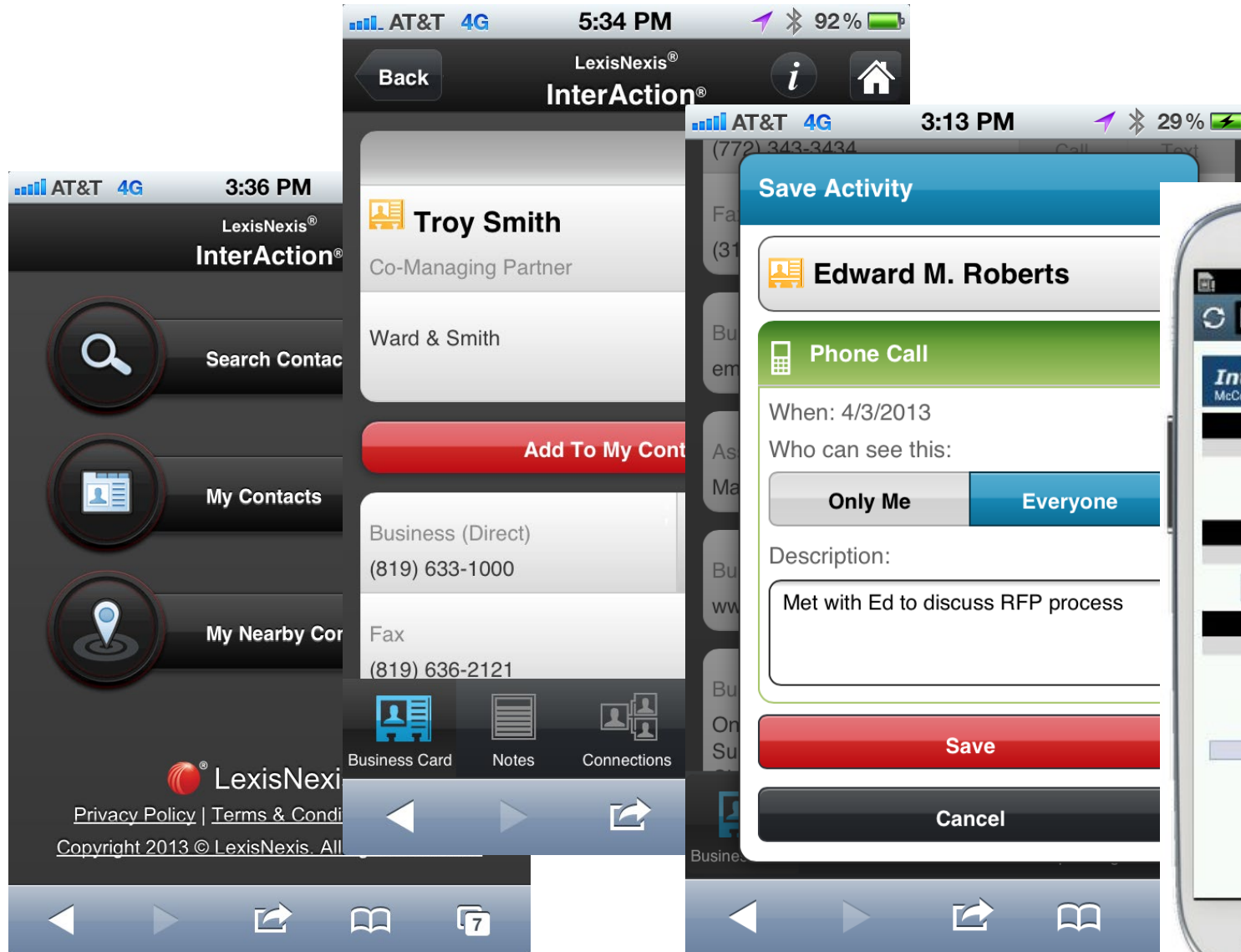
Auto Merge...

Share...

Close

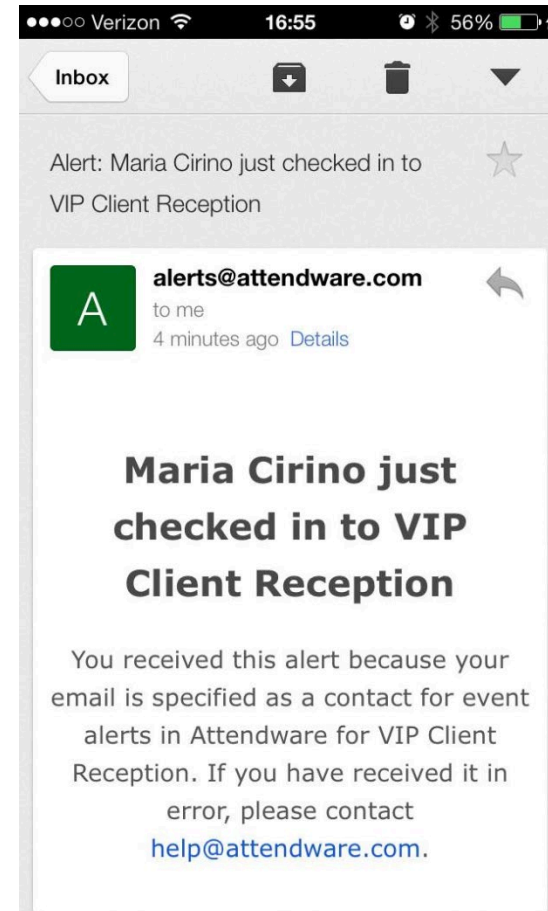
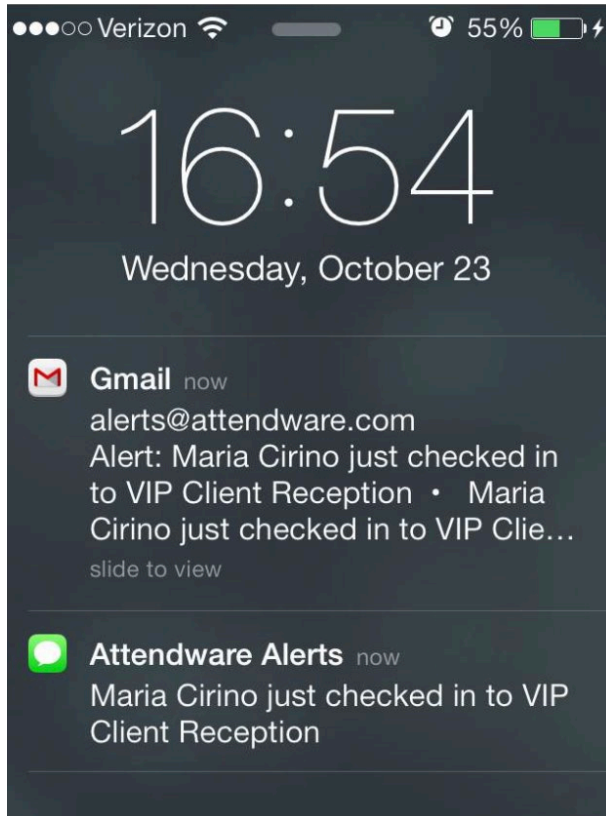


Mobile



AttendWare

- Benefit to being in places like Boston and San Francisco – Startups!
- Two college kids who thought running event registration was too complicated
- We have leveraged it with success



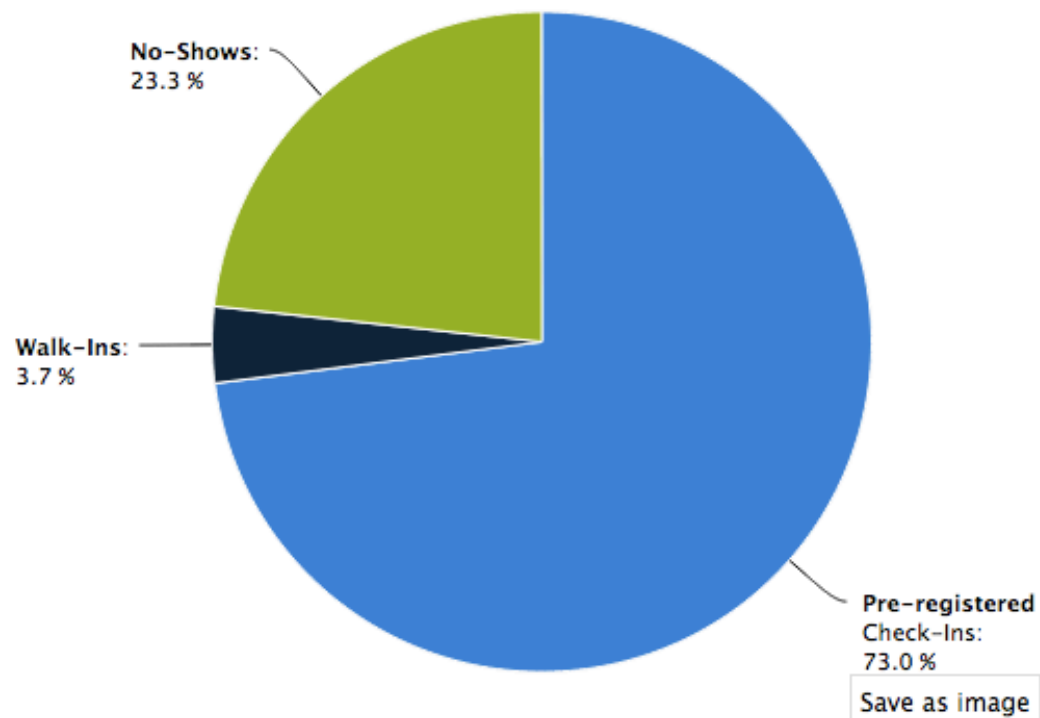
CHECK-IN STATS

Total Registrations: **1237** 

Total Check-Ins: **949** 

Total Walk-ins: **46** 

Total No-shows: **288** 



Pre-Event BD Analytics

From: Callanan, Audra

Sent: Wednesday, July 24, 2013 12:55 PM

To: Aber, Alexander; Block, Tom; Celorier, Marybeth; Collins, Jeff; Eckert, Matthew; Fiocco, Barbara; Garner, Constance; Gentleman, Mary Beth; Gershengorn, Ara; Hancock, John; Jaffe, Seth; Kahn, Adam; Keating, Michael; Laporte, Claire; Lerer, Jeffrey; Limaj, Michelle; Lincoln, Sharon; Mirenda, Anthony; Patterson, John; Richlin, Dean; Rosen, Michael; Rosenblum, Peter; Russell, Hathaway; Sanoff, Robert; Schwartz, Andrew; Shapiro, Sandra; Shope, John; Smith, Jim; Smith, Gare; Ware, Donald; Whitham, Michele

Subject: Your contacts attending tomorrow's education program

Hello everyone -

Our newly-launched education vertical is producing its first programming event tomorrow. This [program](#) will cover the education admissions process in the wake of the Supreme Court's recent ruling in *Fisher v. University of Texas*.

Our RSVP list includes 50 representatives from 26 area educational institutions. In addition to clients, our event has attracted a number of prospects and former (inactive) clients. I wanted to share the list with you along with the registered guests linked to you in InterAction.

Audra

RSVPS

First Name	Suffix	Job Title	Profile
Christine	Esq.	Vice President and General Counsel	Current Client
Lisa	Ph. D.	Chief Diversity Officer and Special Assistant to the President	Current Client
Dr. Iona		Professor	Current Client
Lisa		Associate Provost	Current Client
Debra A.		Director, Undergraduate Admissions	Current Client
Shirin	Esq.	General Counsel	Current Client
Selase		Provost	Current Client
DiOnetta		Director, Office of Minority Education	Current Client
Shawna		Executive Director	Current Client
Jeanette		Program Coordinator, Office of Engineering Outreach Programs	Current Client
Tammy		Associate Dean, DME	Current Client
Nicole		Chief Diversity Officer	Current Client
Susan		Director of Undergraduate Admissions	Current Client
Benjamin		Associate Director of Admissions	Current Client
Deirdre	Esq.	General Counsel	Current Client
Georgianna		Executive Director, Commonwealth Compact	Current Client
Grant		VP of Enrollment, Dean of Admissions	Former Client
Terry		Director	Former Client
Courtney		Director, Undergraduate Admission	Former Client
Barbara		Director, Graduate Admissions	Former Client
Sadie		Chief Diversity Inclusion Officer	Former Client
Danielle		Assistant Director for Admissions	Former Client
Lauren		Assistant Director of Admissions	Former Client
Marta		Government and External Affairs	Former Client
Richard		President	Key Industry Org
Brad		Director of Public Policy & Advocacy	Key Industry Org
Rob		VP for Government Relations/ General Counsel	Key Industry Org
Kaitlyn		Director of Member Relations	Key Industry Org
Anne		Communications Manager	Key Industry Org
Sarah		Dean of the Faculty & Vice President for Academic Affairs	Prospect
Nancy		Dean of Students and Vice President for Strategic Initiatives	Prospect
Mario		Director of Undergraduate Admissions	Prospect
Liliana		Director of Multicultural Student Outreach and Support	Prospect
Katie		Associate Director Financial Assistance	Prospect
Gloria	Esq.	President	Prospect
Ryan		Admissions Counselor	Prospect
Nicole		Resident Director	Prospect
Damita		Director of Multicultural Programs and Associate Director of Student Activities	Prospect
Mary Beth		Assistant Dean for Community Standards	Prospect
Brit		Senior Director of Admissions	Prospect
Jennifer		Recent Graduate	Prospect



Integration and Automation

To Integrate or Not to Integrate

- First, ask a question: Why?
 - Communication, coordination, Client service, business development
 - Enhanced user experience or participation
 - Ease of access to information
 - Reduced costs
 - Less time spent on redundant processes



Consider the Costs of Integration

- Implementation
- Subscriptions
- Training
- Staffing
- Maintenance
- Ongoing upgrades
- Data quality



Integration Options

- Time & billing
- External data sources
 - Company and industry info
 - Litigation and deal info
- Analytics
- Portals
- Social
- E-mail marketing

Data Sources: Company Information

InterAction - Profiles - Microsoft Internet Explorer

The Boeing Company

All | [Company](#) | [LexisNexis Profile](#) | [Corporate Structure](#)

Company Profile

State of Incorporation: DE
Metropolitan Area: Chicago
Company Ownership: US - Public
Ticker Symbol: BA
Exchanges: NYSE - New York Stock Exchange; EU Stock Exchanges; LSE - London Stock Exchange; TKS - Tokyo Stock Exchange

Total Revenue/Sales: \$52,457,000,000
Total Assets: \$53,963,000,000
Net Income: \$1,872,000,000
Total Liabilities: \$42,677,000,000
Net Worth: \$11,286,000,000
No. of Employees: 166,000
Fiscal Year End: 12/31/2004

Client Development Profile

[Go to Company Dossier](#)
[Go to Litigation History -- US Federal Civil](#)

Corporate Structure Profile

[Go to Corporate Structure in LexisNexis Corporate Affiliations](#)

Close

Company Profile: Boeing Company Profile

Save/Share/Schedule | Create a PDF

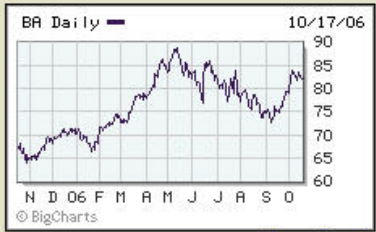
Company Overview | Financial Data | Intellectual Property | Litigation Trends | News Articles | Corporate Transactions | Corporate Hierarchy | Search Criteria

Select Company: BOEING CO

[Expand All Sections](#) | [Collapse All Sections](#)

Overview

Company Type: US Public
Physical Address: 100 N. Riverside Plaza
Chicago, Illinois 60606-1596
Telephone: 312-544-2000
Fax: 312-544-2082
Email: mail.boeing2@boeing.com
Web Site: www.boeing.com
Stock Information: BA [NYSE]
Industries: Ordnance and accessories, nec (3489)
[10 Secondary SIC Categories](#)
Other Offices: No information is available
Key Competitors:¹ Airbus, Lockheed Martin, Northrop Grumman
Business Description:² Boeing is the 800-pound gorilla of US aerospace. The world's largest aerospace company, Boeing is also the #2 maker of large commercial jets (having fallen behind bitter rival Airbus) and the #2 defense contractor behind Lockheed Martin. Boeing has two major segments: Commercial Airplanes and Integrated Defense Systems. Boeing's commercial aircraft include the 787 Dreamliner (due in 2008), 767, 747, and the 737; military aircraft include the F/A-18 Hornet, the F-15 Eagle, the C-17 Globemaster III transport, and the AH-64D Apache helicopter. Boeing's space operations include communications satellites, missiles, the International Space Station, and the Space Shuttle (with Lockheed).



© BigCharts [More Charts](#)

Finances

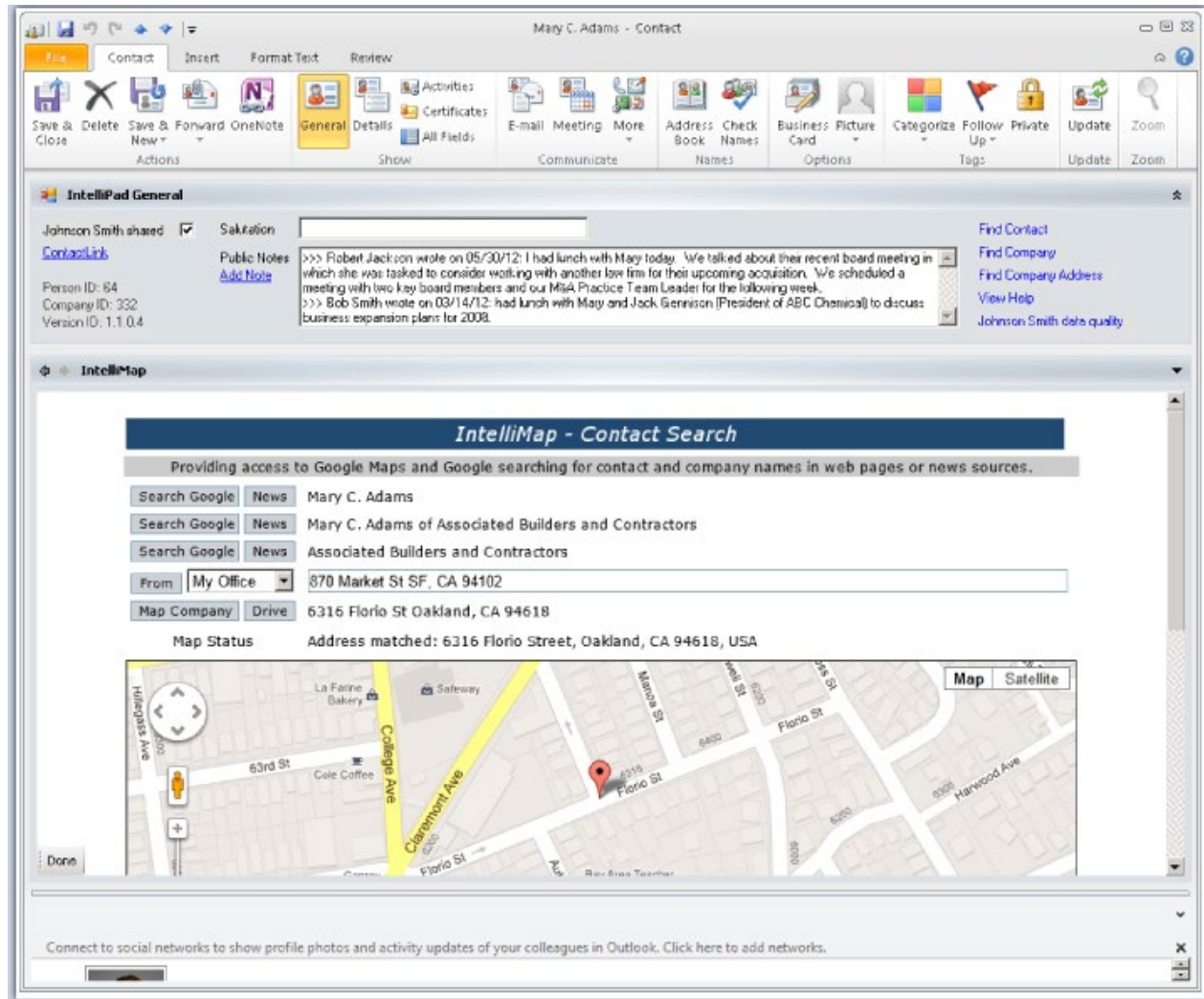
Last Fiscal Year:

Total Assets:	\$60,058,000,000 ³
Total Liabilities:	\$48,999,000,000 ³
Net Sales:	\$54,845,000,000 ³
Net Income:	\$2,572,000,000 ³

Auditor:² Deloitte & Touche LLP, 2006
Stock Information:³

Market Capitalization:	\$60,812,933,756
Outstanding Shares:	800,170,181

Maps



ERM and LinkedIn Integration

ContactEase Relationship Discovery Information for: All Contacts

Enter keyword (s) Search

Displaying records 10 to 19 of 26 records.

Industry (# Contacts)	Company (# Contacts)	Contact Name (Known By)	Known By	Strength	In CRM	LinkedIn
Construction (19)	Blackmore Brothers, Inc. (6)	Blackmore, Henry (4)	Higgins, Jennifer	6		
Gas Utilities (1)	Sempra Energy (1)	Kraskic, Petrov (4)	Bannister, Brenda	5		
Construction (19)	Glengarry Construction (2)	Farrell, Karen (2)	Osprey, Andrew	5		
Federal Government - Taxation (1)	IRS (1)	Blankenship, Melissa (2)	Plintz, Brenda	4		
Construction (19)	Kaszprzak Building Systems (4)	Mansford, Bryan (2)	Plintz, Brenda	3		
IT Services (5)	Hansen (2)	Victorn, James (1)	Osprey, Andrew	3		
Multimedia Specialists (3)	Vectorz, LLC (4)	Plantair, Freida (1)	Higgins, Jennifer	2		
Property Management (1)	Briardayle Realty (1)	Wendt, Teresa (2)	Higgins, Jennifer	1		

LinkedIn Integration

The screenshot displays a web browser window with two main panels. On the left is a 'Ticket Management Inbox' sidebar, and on the right is a LinkedIn profile page for James Paterson.

Ticket Management Inbox (Left Panel):

- Ticket List:** A table with columns for 'Ticket' and 'Status'. The ticket number 379552 is highlighted in blue.
- Ticket Details (379552):**
 - Ticket #:** 379552
 - Category:** Edit
 - Contact Information:** Name, Job Title, Company, Contact Type
 - Modification Details:** Part of an employment, Summary, Job Title
 - Changed From:** Business
 - Linked In Information:** This link is circled in orange with a speech bubble pointing to it.

LinkedIn Profile (Right Panel):

- Profile Header:** James Paterson, Sr. Director, Product Line Management at LexisNexis. Location: Raleigh-Durham, North Carolina Area. Industry: Information Technology and Services.
- Current Company:** LexisNexis
- Previous Company:** LexisNexis, ZS Associates, Netstore
- Education:** Duke University - The Fuqua School of Business
- Connections:** 500+
- More Search Results:** A carousel showing other profiles, including James Paterson (GROUP) as Senior Proposition Manager at Coventry BS.
- Advertisements:**
 - GILD:** The Global Institute for Leadership Development, October 6-11, 2013, Palm Desert, CA.
 - Linkage:** The world's #1 leadership program. Includes a 'Learn More' button and the website www.mlinkage.com/mkt.

LinkedIn Integration

The screenshot shows a LinkedIn profile for Pete Hudson, M.D., Chief Executive Officer at iTriage LLC. The profile includes a profile picture, a cover photo, and a summary. A callout box highlights the contact information:

Pete Hudson
Chief Executive Officer | iTriage LLC

pete.hudson@itriage.com
(303) 958-9605 (Direct)
(303) 958-8544 (Mobile)

[More contact information](#)

Last Contact
1/13/2013 (E-mail)
By Sue Anderson

Background

Summary

Dr. Hudson is a physician and entrepreneur with over 15 years experience for healthcare-related businesses. His focus has been on creating efficiencies in the system, and empowering healthcare consumers with technology. Dr. Hudson is an entrepreneur with four exits (three to public companies), a healthcare investment side and buy-side experience, and has served as the managing partner of large private equity firms. He is listed as one of the 100 Entrepreneurial Dealmakers in Healthcare in 2012.

Background

Summary

Dr. Hudson is a physician and entrepreneur with over 15 years experience for healthcare-related businesses. His focus has been on creating efficiencies in the system, and empowering healthcare consumers with technology. Dr. Hudson is an entrepreneur with four exits (three to public companies), a healthcare investment side and buy-side experience, and has served as the managing partner of large private equity firms. He is listed as one of the 100 Entrepreneurial Dealmakers in Healthcare in 2012.






LinkedIn Integration

The screenshot shows the Sizzler USA website with a restaurant locator and a LinkedIn integration overlay. The website has a green header with the Sizzler USA logo and a navigation bar with links: Home, Locations, Our Food, Gift Cards, and About Sizzler. The main content area features a large image of a steak and vegetables. The LinkedIn overlay is a white box with a black border, containing the following information:

Sizzler (Client)
25940 Acero Road
Ste. 350
Mission Viejo, CA 92691
United States

+1-949-273-4497
+1-800-961-9214

Search Q


 5 Company Connections	 0 Upcoming Events	 2 Touches in Past 30 Days	 2 Open Matters	 1 Open Opportunities	Via win 20% of Opportunities with Sizzler
---	---	---	--	--	--

Firm Members with the most connections

- [Sue Anderson \(3\)](#)
- [John Stephens \(1\)](#)
- [Steve Potruknik \(1\)](#)
- [Bob Davis \(1\)](#)

Firm Notes

Sizzler USA Restaurants operates and franchises more than 175 Sizzler family-style steak houses in about 15 states and Puerto Rico. The eateries serve a variety of steak, chicken, and seafood dishes and feature a buffet-style salad bar that also

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Gift Cards Sizzlin' Special What's Up?

E-mail Marketing CRM Integration

InterAction®

Marketing Lists

All Actions on Behalf of
Myself

Actions • Manage My Frequently Used Lists

Show: All Lists

List Type

List Type	Name ▲
Marketing List (with sponsorship)	Acquisition Notification
Marketing List (with sponsorship)	Business Development
Marketing List (no sponsorship)	Client Satisfaction Survey
Marketing List (with sponsorship)	Company Survey
Marketing List (with sponsorship)	Company Survey - Anti
Marketing List (with sponsorship)	Contacts to be Sent Ve
Marketing List (no sponsorship)	Executive Compensation
Marketing List (with sponsorship)	Firm Newsletter
Marketing List (with sponsorship)	Firm Newsletter - Anti
Marketing List (no sponsorship)	Healthcare Legislation

Home

My Watch List™

My Contacts

Contact Types

Marketing Lists

Working Lists

Admin

VutureVx Send Email: [Compose Email/Intelmail](#)

From: Partners

Subject: intelmail

Reply-To:

List source: InterAction

List to send to: * Send No Marketing Communications

Filter list: No filter

Acquisition Notification

Business Development Information

Client Satisfaction Surveys

Company Survey

Company Survey - Antifolder

Contacts to be Sent Verification Requests

Executive Compensation Alerts

Firm Newsletter

Firm Newsletter - Antifolder

Healthcare Legislation Alerts

Holiday Card

status

IA

Unsubscribed

85

Constant Contact Integration

Versys IntelliPad - lynda - Windows Internet Explorer

http://vc05/intellipaddev/home.cfm

File Edit View Favorites Tools Help

Favorites Versys IntelliPad - lynda

IntelliPad - McCoy Jones Abernathy & Jackson LLP

Management Help About

Lynda Hendrell (lynda, 7) Restart

People Companies Events Tasks Views

New Event | Find Event | View Calendar | Manage Views | Manage Mail | Add Links | Set Default View | Show Default View |

Mail Manager

Record mail responses, review past mail tasks, and create new mail tasks

Event: [First major email campaign, new contacts \(ID: 266\)](#)

Default Mailing Address: Company Start Date: 03/29/13

Linked People: 7 Replied Yes: 0 Replied No: 0 No Reply: 7 [Add People Links](#)

Response	Person Name	Tasks	Company Name	Email Address
<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> None	Horvath, Gene	1	Versys Corporation	li.hend@hotmail.com
<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> None	Jackson, Paul	1	Versys Corporation	bmccov@knology.net
<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> None	Kurth, David	2	Versys Corporation	bmccov@ourdds.org
<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> None	Legume, Keith	1	Versys Corporation	versys.lyndah@gmail.com
<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> None	Longthorne, Kendra	1	Versys Corporation	jqillon@versys.com
<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> None	Marcato, Lorenzo	1	Versys Corporation	cctest7@versys.com
<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> None	Smithers, Jane P.	1	Versys Corporation	bmccov@versys.com

[Save](#) [Cancel](#)

[Email Tasks \(0\)](#) [Add Email Task](#) [Copy Email Task](#)

[Data Source Tasks \(0\)](#) [Add Data Source Task](#) [Copy Data Source Task](#)

[Constant Contact Tasks \(2\)](#) [Add Constant Contact Task](#) [Copy Constant Contact Task](#)

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Growing Relationships

For Business Development and CRM Success



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Business Development Aggregation and Analysis



Why We Are Hired

“If marketing does not support business development & help drive revenue, we should pack it up and go home.”

- Jasmine

CRM + Elite = Bus. Dev. Tracking

- Firm has always tracked BD time spent with prospects & clients in Elite
- Supplying data mandatory but old system required re-entering data in a third system
- Marriage of Elite and InterAction via Sharepoint Intranet Portal
- Secretaries assign partner BD activities on contacts in InterAction quickly each month
- Elite data most reliable as attorneys will ALWAYS track time.

Activity Reconciliation

InterAction Contact Lookup

First Name:

Last Name:

Company:

Search Results: [More info on selected contact](#)

Levy, Timothy J. Esq. (Microsoft, Inc.)



Selected Contacts:

Levy, Timothy J. Esq. (Microsoft, Inc.)



If you cannot find the contact you wish to associate this activity to, please add them to [InterAction](#)

Activity Details

Summary:

Activity Date:

Activity Type:

Notes/Next Steps:

Related People, Companies and Organizations

My Co-workers who Know this Person | [Key Relationships](#) | [Co-workers](#) | [All Relationships](#) | [Board Member](#) | [More...](#)

[Add Related Contact](#) | [View as Full Page](#)

Edit

View

Actions

2 Contacts

Reports

View Printable Version

			Name	Title	Office	Primary Phone	E-mail	IQ	Relationship Description
			Aber, Alexander J.	Partner		(617) 832-3028			Knows
			Chang, Hemmie Esq.	Partner		(617) 832-1175			Knows

2 Contacts | [Reports](#) | [View Printable Version](#)

[Send Inquiry to Co-workers Who Know](#)

Activities

[Add Activity](#) | [View as Full Page](#)

Show: [Activities Regarding Contacts](#) from: 90 day(s) ago to: 0 day(s) ahead [Change View](#)

Edit	View	Actions						
<input checked="" type="checkbox"/>			Date ▼	Regarding	Activity Type	Summary	Originator	
			4/3/2013	Contact	BD Phone Call	Telephone conference with 1	Aber, Alexander J.	

1 Activity | [Reports](#) | [View Printable Version](#)

How Information Helps

- Keeps the business development team “in-the-know”
- Minimizes pitch collision
- Encouraged collaboration
- Knowledge on how we get clients, how long it takes and where we are wasting time

The Final Key to CRM Success

■ FOOD !



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BREAKout!



What is E-mail Marketing *- Really?*

What is E-Mail Marketing?

Directly marketing a commercial message to a group of people using email. In its broadest sense, every email sent to a potential or current customer could be considered email marketing. It usually involves using email to send ads, request business or solicit sales or donations, and is meant to build loyalty, trust, or brand awareness. Email marketing can be done to either sold lists or current customer database.

- Wikipedia



Why E-mail Marketing

Why E-mail Marketing Is Important

- Email usage is at an all-time high
 - The number of email accounts predicted to reach 3.8B by 2014
 - 94% of all online adults use email
 - 87% of people rely on email as their primary communication tool
 - People spend an average of 4 hours a day using email
- Marketing e-mail predicted to increase in 2014
 - Email marketing spend will balloon to \$2 billion in 2014
 - 46% of business leaders are planning to increase their investment in email marketing this year
- \$144 million will be wasted on blocked e-mails that don't reach their intended audience

The Real Value of E-mail Marketing

- It's the easiest and cheapest content marketing tool
- It has an ROI Better than any other direct marketing channel - \$42.08
- Target / segment audiences
- Showcase experience and expertise
- Demonstrate thought leadership
- Target Client problems, issues
 - Every change is an opportunity
 - Laws, regulations, compliance
- Generating leads
- Treat it as a relationship, not mass market, medium



E-Mail Marketing Tools

E-mail Providers

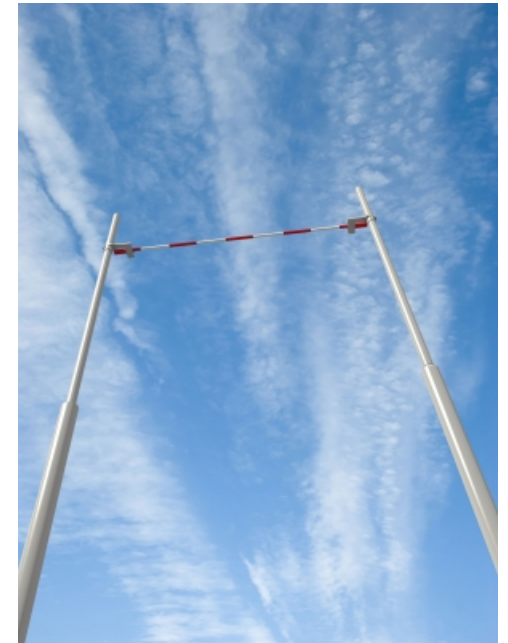
- Concep
- Saturno
- Tikit
- Vuture
- Click
Dimensions
- ActOn
- Aweber
- Campaigner
- Campaign Monitor
- Constant Contact
- Exact Target
- IContact
- Mail Chimp
- My Emma
- Silverpop
- Swiftpage
- Vertical Response



E-mail Marketing Challenges

E-mail Marketing Issues

- More e-mails are being sent out than ever before
- People are experiencing “e-mail fatigue”
- Open and click rates are declining
- SPAM and data privacy regulations are increasing
- Blacklisting is a problem
- Attorneys face a higher bar



WARNING

Attorney advertising.

Prior results do not guarantee a similar outcome.

**Any correspondence with this presenter does not constitute a
attorney/client relationship.**

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We're serious.**

Law Firm E-Mail Marketing

- Lawyers cannot cold call and thus, cannot send to purchased lists
 - Instead we use “opt-in” or “permission based” Email Marketing”
 - The recipient must consent to receive it
- Law firms can also send email marketing to existing clients
 - The best open-rates come from this audience



How to Succeed at E-mail Marketing

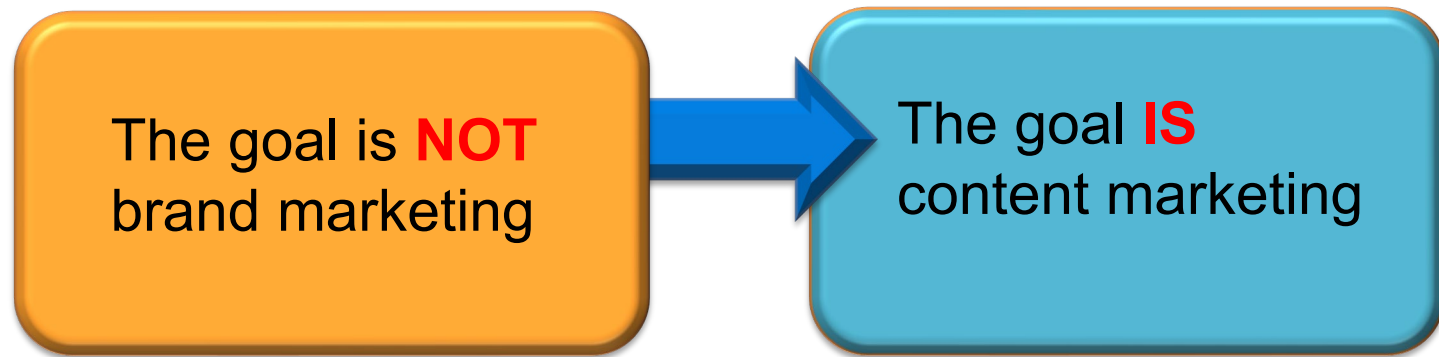
Content Is King

- Bad content will prompt unsubscribes and train people not to open your e-mail
- Targeted single topic alerts are better than newsletters that contain information that is no longer timely
- Put the most important message at the top
- Be human and avoid 'legalese'
- Be short and to the point
- Have a call to action

What is Content Marketing?

- Content marketing is the art of providing relevant, valuable content to your clients and prospects without selling or interrupting them
- Instead of pitching your services, you are delivering information that makes your prospective client more intelligent before they commit to you
- If you deliver consistent, ongoing valuable information to clients, they ultimately reward you with their business and loyalty

Where Business Development Meets Marketing



How Content Marketing Helps BD

- Buyers of legal services require validation
- Attorney must be seen, through references, publications and Google, to have the correct expertise.
- Firm must be seen as having the depth needed in the area to support the attorney being hired
- Expertise must be shown in the area that the buyer is interested in.
- If you market yourself as all things to all people you will not be “found” by someone in a specific industry or with a specific issue

Multi-purposing = Essential + Free

Presentation/Semi
nar

Webinar

Video Recording

LinkedIn Bio

Firm Website Bio

Individual Attorney
Emails

Client Alert

Internal Education

Multiple Blog Posts

Article

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Success Strategies

E-mail Strategies

- Start with a strategy and plan
- Integrate with CRM
- Write to be read
- Include a call to action
- Know when to send
- Focus on content
- Test

Testing

- Define metrics for success
- Benchmark against the industry
- Benchmark against yourself
- Analyze results

Sending Schedules

- Time of send can affect opens
 - First thing in the morning generates the highest opens
 - Tue, Wed and Thu are the best launch days
- If messages are regularly scheduled, Clients begin to expect them and get in the habit of reading them
 - Communications sent out daily (+27.8%, +100.3%)
 - Communications sent out weekly (+27.1%, +50.6%)
- But messages shouldn't be scheduled too infrequently
 - Communications sent out “Monthly” (-26.6%, -37.0%)

E-mails That Get Read

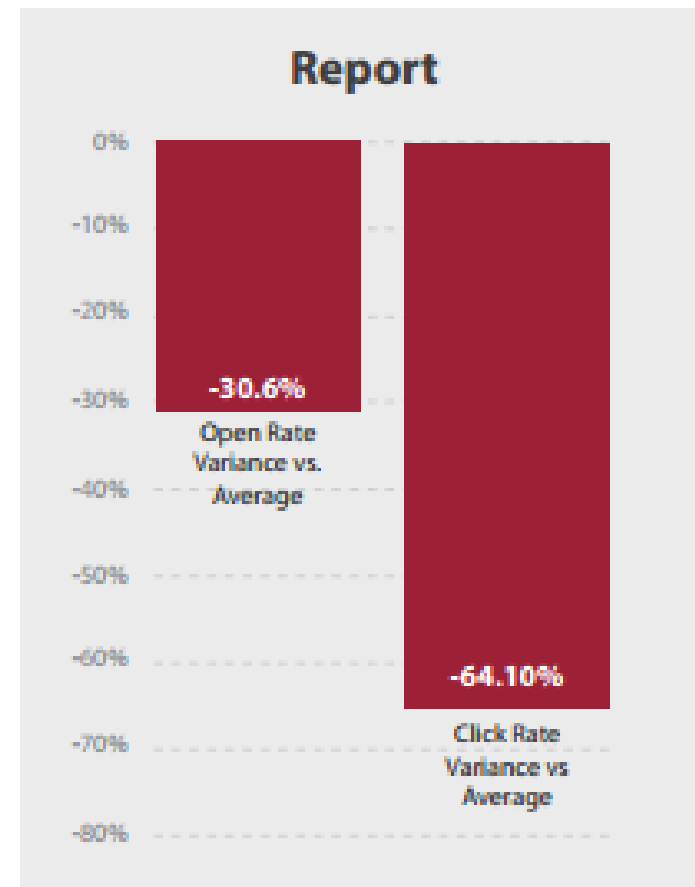
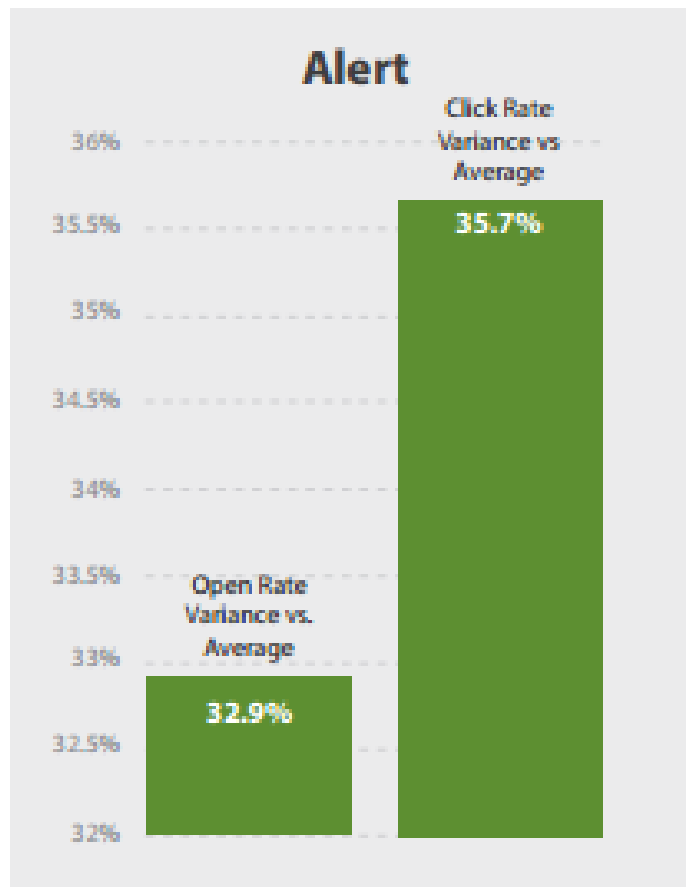
- Alerts
- Changes
 - Laws, regulations,
 - Compliance
- Top lists
- Timely updates
- Information to improve professional and personal lives
- Education

Successful Subject Lines

- Convey a benefit and good content
- Pique interest
 - Asking a question can get responses
- Design for the message and preview panes
 - Shorter is better - avoid using more than 49 characters.
 - Subject lines with fewer than 10 characters yielded the highest open rates at 51%
- Describe the purpose and content of the email
- Personalization historically improved open rates
 - But using the recipient's first name doesn't
 - Instead speak to them in their own lingo

Subject Lines

- People want information that is time-sensitive and time saving



Interesting (and not so Interesting) Subjects

- Some words work better than others for opens or clicks
 - “Newsletter” has a slight positive on opens, (+0.7%), but a strong negative effect on click rates (-18.7%.)
 - “Alert,” (+38.1% opens) (+61.8% clicks)
 - “Bulletin” - (+15.8%, +12.7%).
 - “Report” (-23.7%, -54.8%,)
 - “Learn” (-35.5%, -60.8%,)
 - “Book” (-4.6%, -25.4%)
 - “New” (+17.2%, +38.2%)
 - “Free Delivery” (+50.7%, +135.4%) .
 - “Percentage off” (+10.5%, +27.4%).
 - “Sale” (10.7% 26.7%)
 - “Cheap” (-67.2%, -71.6%)
 - “Free” (-23.7%, -34.8%)

Calls to Action

- Short, targeted, clear
- Dates can be excellent triggers
- Something has changed
- Immediate action needed
- We can solve your problem
- We can teach you something
- We can help your business
- Have contact info for more information



List Management

Lists

- Should be grown organically over time
- Should never be purchased
- Should regularly be vetted
- If a recipient hasn't opened an email in a year, consider deleting them
- A 5% reduction in customer defection can boost profit by over 25%
- Bigger isn't necessarily better

Targeting / Segmenting

- Smaller targeted lists yield better results
- Quickly identify groups and connect them with relevant information
- Demonstrate your knowledge and expertise in direct relation to individualized needs or segments



Segments

- Clients
- Prospects
- Alumni
- Referral sources
- Job titles
- Interests
- Assets
- Gender
- Age
- Industries
- Geographies / locations
- Company size
- Revenue
- Practice areas needs
- Current services utilized
- Goals
- Needs

Improving Campaigns

- Avoid list fatigue
 - The more you send, the lower your key metrics will be
 - But infrequent messaging can also affect your key metrics
- Validate list recipients
- Improve subject lines
- Improve content relevance
- Use landing pages to give unsubscribes options
- Consider calling people who unsubscribe
- Test your campaigns

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Testing...
1, 2, E



How and What to Test

- Test the way the e-mail looks when delivered
 - It can be very different depending on the browser or Clients
 - There are no 'standards'
 - Images are often blocked by default
- There are a number of tools that can be used
 - Litmus, Lyris, Return Path
 - Some may come with your e-mail software
- It can take time, so allow at least 24 hours before sending
- Test at least quarterly because things do change
- Be sure to test in mobile

How and What to Test

- Use about 10% of your list
- Test e-mail deliverability and recipient preferences
 - ☐ Different subject lines
 - ☐ Time of the day or week
 - ☐ Which segments respond
 - ☐ Text vs. graphics
 - ☐ Layout of information
 - ☐ Unsubscribe wording
 - ☐ Content
 - ☐ Surveys
- Test the way the e-mail looks in different browsers

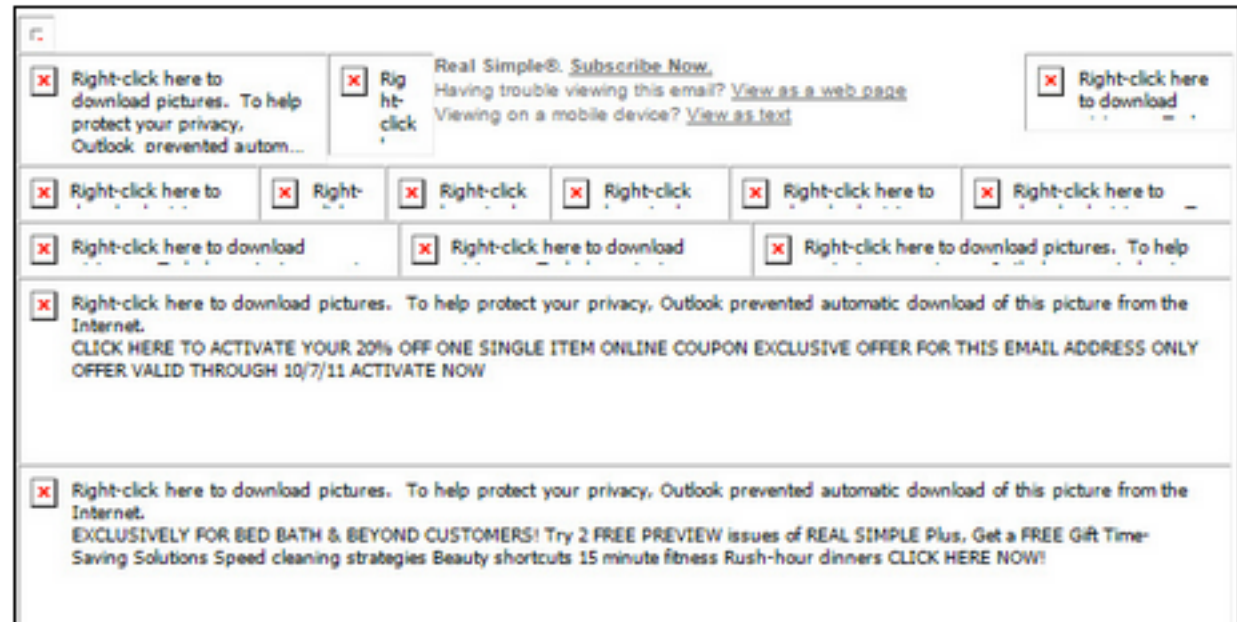
Mobile Stats

- By 2010, 43.5M people in the US were reading email daily on a mobile device
- 69.7% of email users instantly delete an email that doesn't render well on their mobile device
- This means keeping subject lines short is even more important


Judging a Book by It's Cover


NEVER JUDGE A
BOOK BY ITS
COVER.
EXAMPLE:
50 SHADES OF
GREY IS NOT A
BOOK ABOUT
COLORS.


Our parents may have
told us not to, but that was
before email overload




This message contains graphics. If you do not see the graphics, [click here to view](#).


 Right-click here to download pictures. To help protect your privacy, Outlook prevented automatic download of this picture from the Internet.

 Right-click here to download pictures. To help protect your privacy, Outlook prevented automatic download of this picture from the Internet.
24 Hour Sale

 Right-click here to download pictures. To help protect your privacy, Outlook prevented automatic download of this picture from the Internet.

15% OFF CREDITS

 Right-click here to download pictures. To help protect your privacy, Outlook prevented automatic download of this picture from the Internet.

 Right-click here to download pictures. To help protect your privacy, Outlook prevented automatic download of this picture from the Internet.



Tick tock.

Time may not be on your side, but luckily, we are. For today only, get 15% off any credit pack. Just enter the following promo code in your cart when you check out.

***Promo code:**

ISTOCKOCT15

Save on Credits

Follow iStock:  

Does it Pass The Litmus Test

- Before engaging in any email marketing campaign you should invest in a tool that will show you what your emails look like across all potential platforms
- Technology that make me say: How cool is that?



Desktop Email Clients

Apple Mail 5



Apple Mail 6



Lotus Notes 7



Lotus Notes 8



Lotus Notes 8.5



Outlook 2000



Outlook 2002/XP



Outlook 2003



Outlook 2007



Outlook 2010



Outlook 2011



Outlook 2013



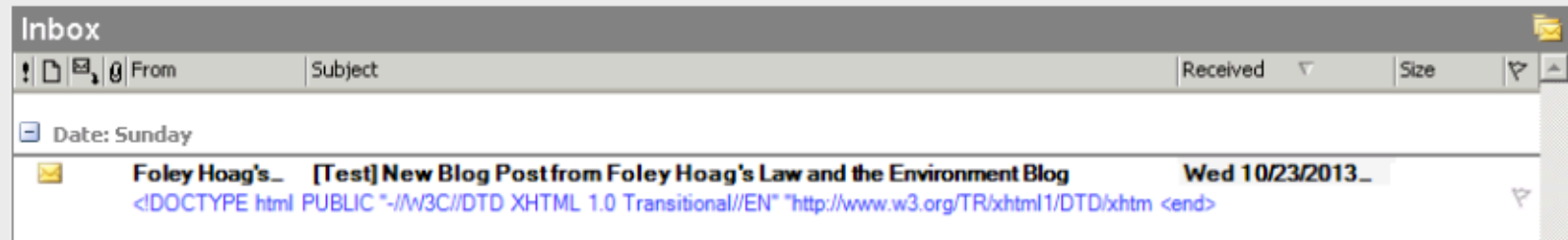
Thunderbird 3.0



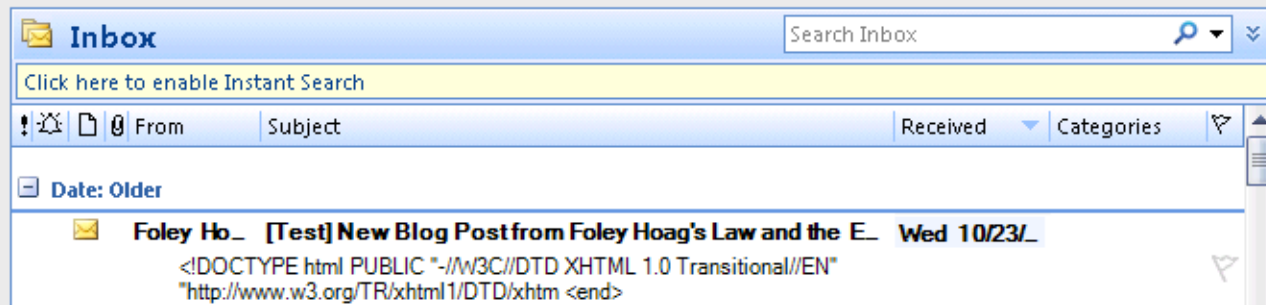
Thunderbird latest



Outlook 2003



Outlook 2007





[View in Browser](#) | [Manage Subscriptions](#)



Employment Bulletin

AUGUST 16, 2013

SJC Holds That Massachusetts Wage Act Is Not Intended To Be Sole Remedy For Recovery Of Unpaid Wages Under State Law

On August 12, 2013, the Supreme Judicial Court (SJC) held in *Lipsitt v. Plaud* that the Massachusetts Wage Act is not intended to be the sole remedy for the recovery of unpaid wages under state law. The Court concluded that employees who file claims under the Wage Act can also seek recourse for unpaid wages through traditional common law claims such as breach of contract or quasi-contract.

In *Lipsitt*, the plaintiff, a museum director for the Franklin D. Roosevelt American Heritage Center, did not receive the full salary due to him under his employment contract because of the Center's financial difficulties. The founder of the Center assured the plaintiff that eventually he would be paid in full, but the Center later closed and the founder abandoned his plan to reopen it in a new location. The plaintiff filed this action in Superior Court seeking over \$100,000 in damages that he contended the Center owed him. His complaint asserted claims for breach of contract, quantum meruit, and violations of the Wage Act, among others.

The Superior Court dismissed all of the plaintiff's claims except for the Wage Act claim. The Superior Court reasoned that the Wage Act is the exclusive remedy for the recovery of unpaid wages and thereby precluded the plaintiff's

If you would like additional information on this topic, please contact [Michael L. Rosen](#) or [Jennifer M. Duke](#) of the firm's [Labor & Employment](#) practice, or your lawyer at Foley Hoag.

For alerts and updates on other topics, please visit www.foleyhoag.com.



Landing Page Test

Click on the hotspots to see test results for each link.



2 links
passed



6 links
had issues



5 links
failed



FOLEYHOAG^{LLP}



LAW & THE Environment

TO INFORM, UPDATE, COMMENT AND
DISCUSS LEGAL ISSUES REGARDING ENVIRONMENTAL LAW

I Believe in Environmental Regulation, But....

By Seth Jaffe on June 7, 2013

As readers of this blog know, I believe in governmental environmental regulation. We have a complicated world and it is not surprising that many activities, including those generating greenhouse gases, cause negative externalities. At the same time, however, I have spent more than 25 years representing regulated entities in negotiations with government regulators and it [...]

iting for cp.litmus.com...

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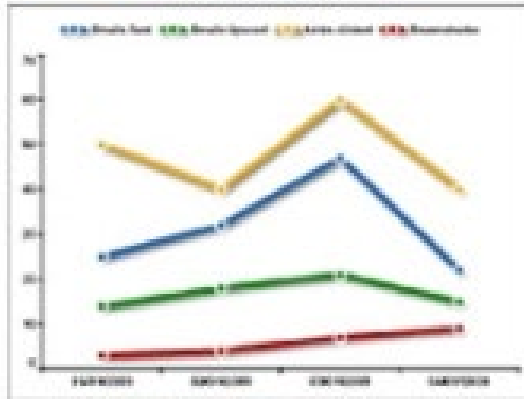


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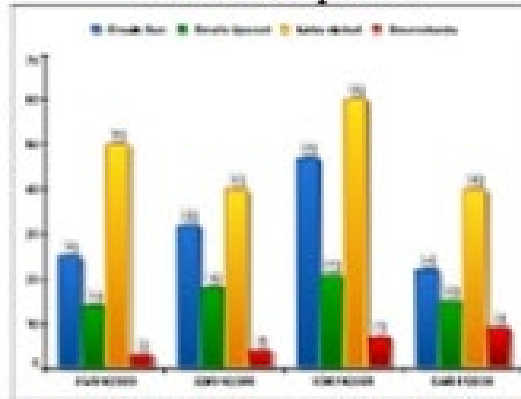
Analytics

E-mail Analytics

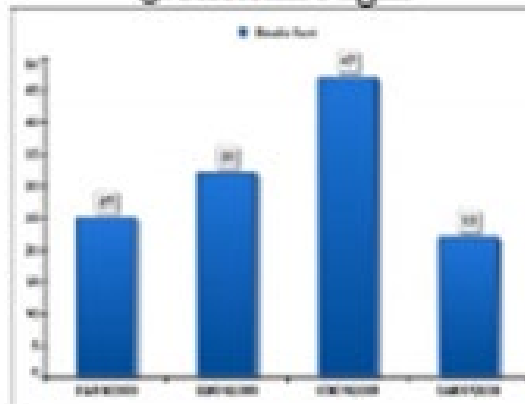
1. Emails Sent



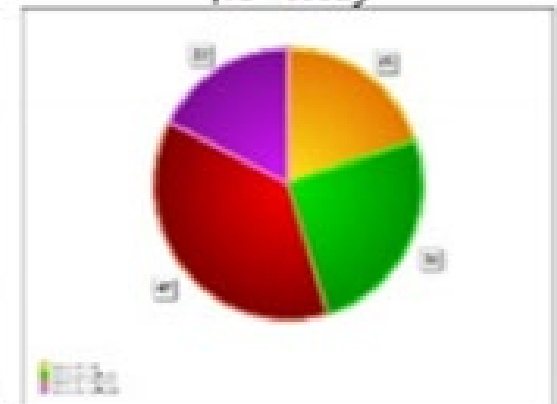
2. Emails Opened



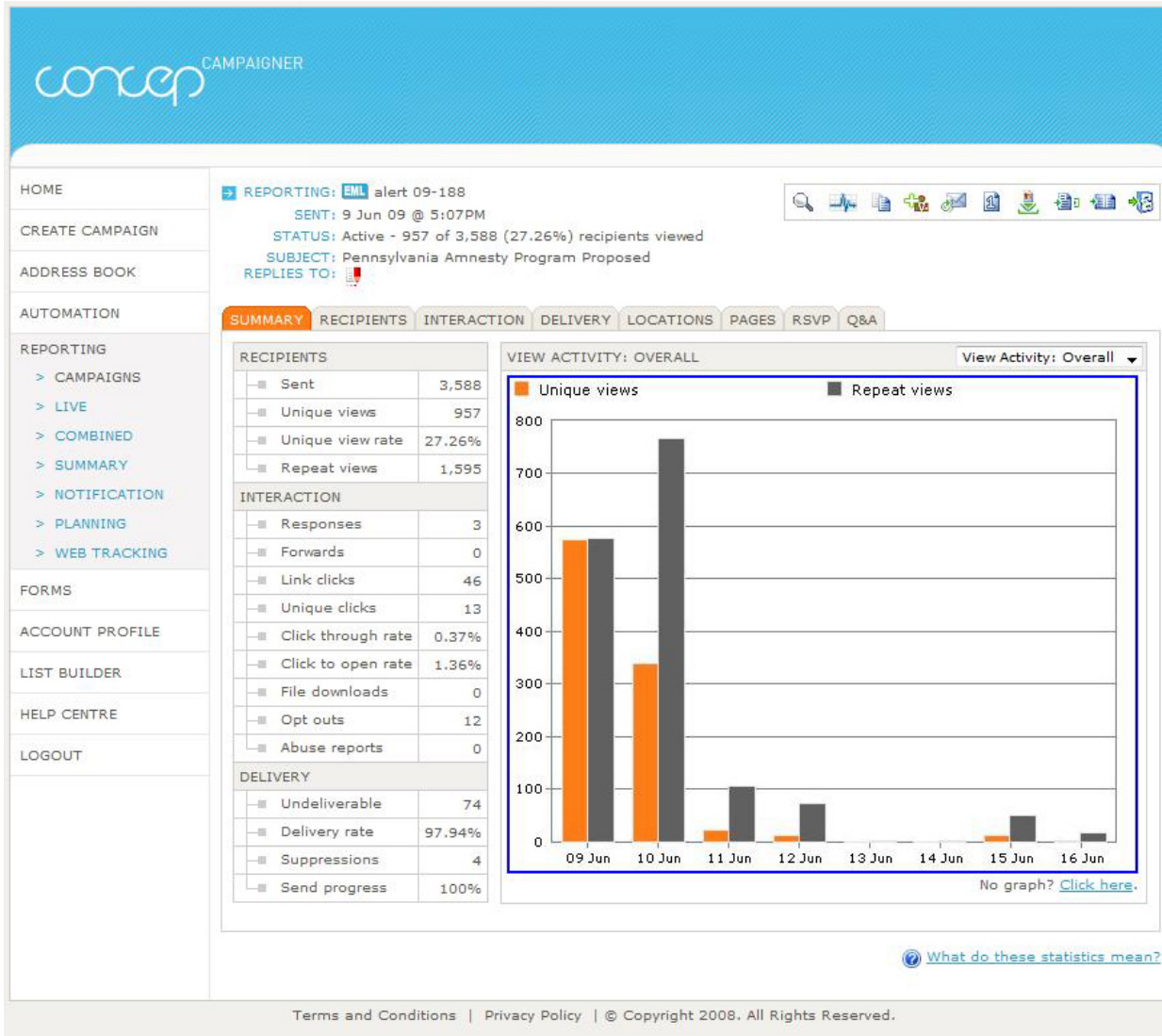
3. Clickthroughs



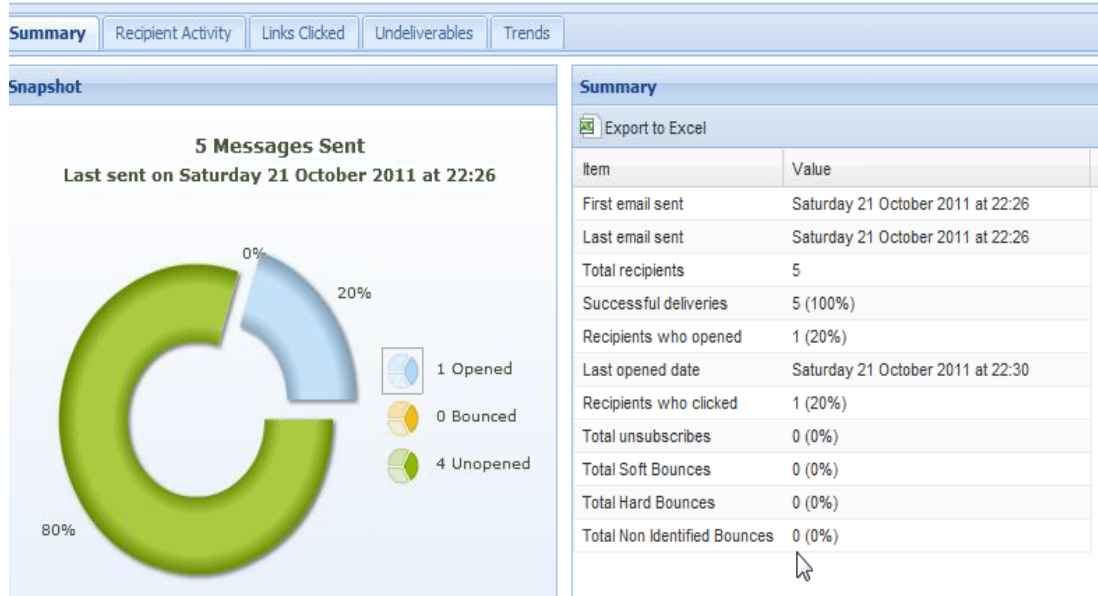
4. Overlay



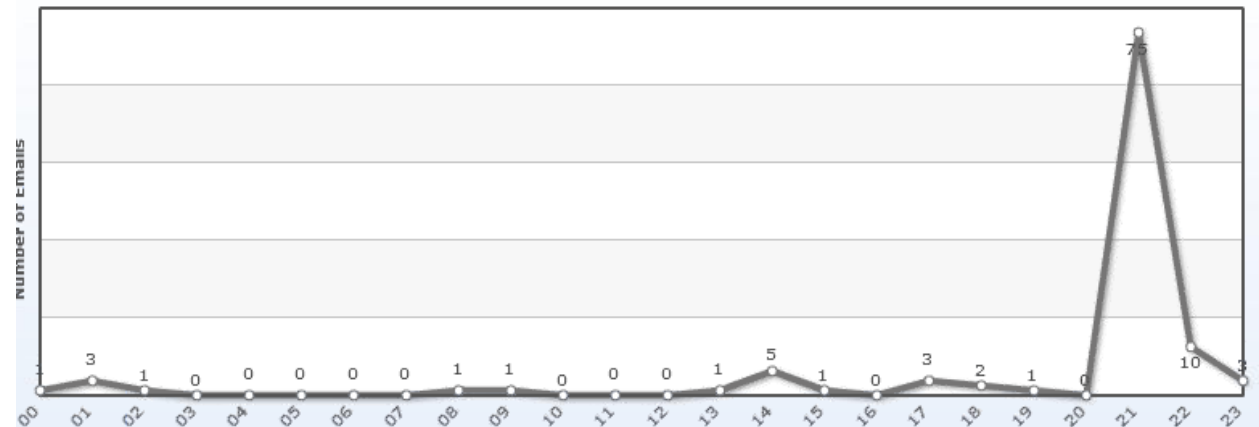
E-mail Analytics

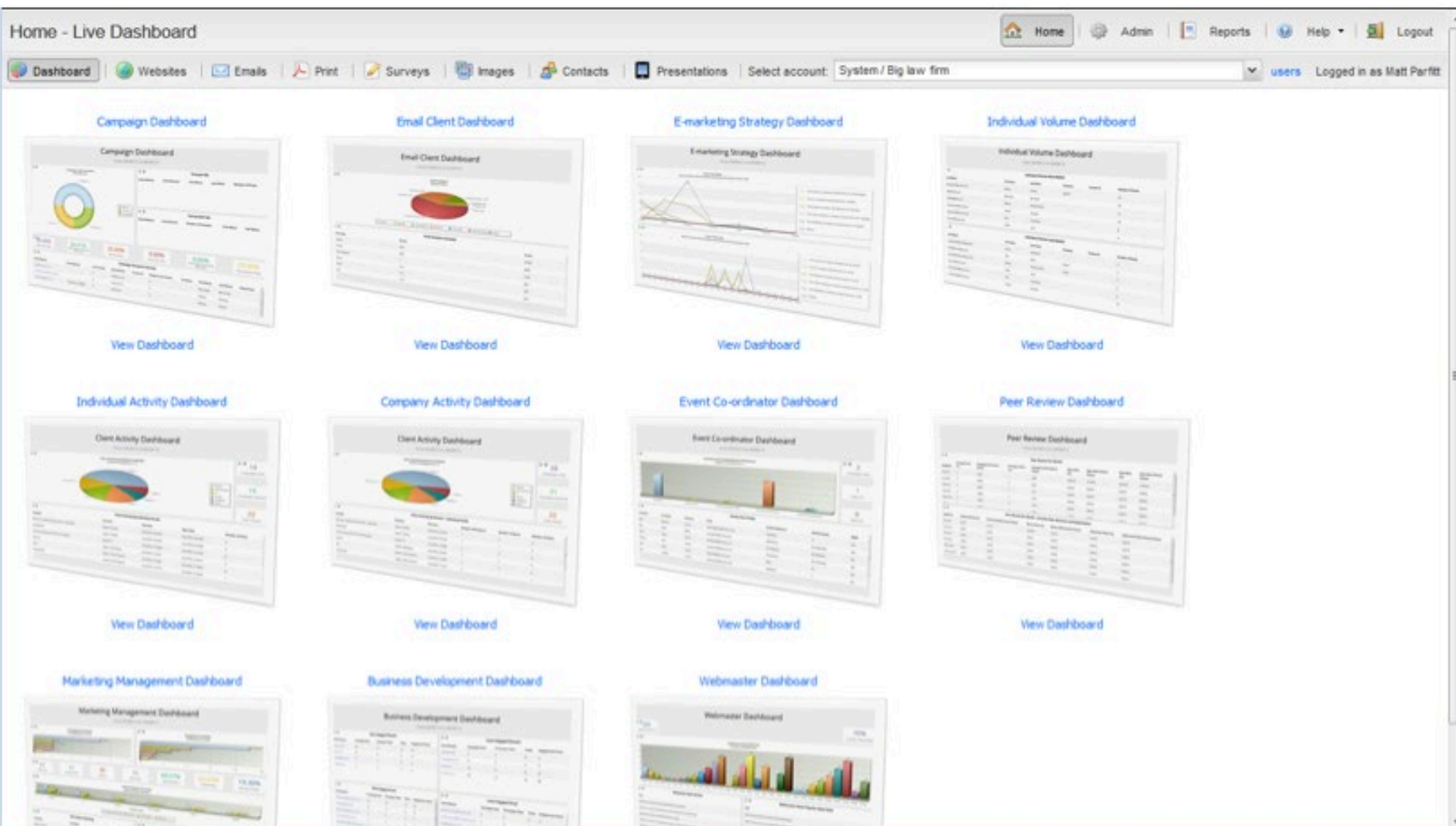


E-mail Analytics



Email Opened Time of Day





Dashboards

Home Admin Reports Help Logout

Company Activity Dashboard

Info Print

Client Activity Dashboard

From 24/10/12 to 24/10/13

Client Activity by Domain Campaigns
Number of Campaigns Sent : 60



148

Emails Sent

91

Campaigns Opened

39

Links Clicked

Info

Client Activity by Domain - Individual Sends

Campaign	Container	Date Sent	Number of Recipients	Number of Opens	Number of Clicks
Newsletter of the month	System / Big law firm / Health care	6 Aug 2013, 09:31:20	4	3	1
Invite - please come	System / Big law firm / Corporate	24 Jul 2013, 09:44:18	3	1	0
D Newsletter	System / Big law firm / Health care	8 May 2013, 11:44:44	2	1	0
Newsletter of the day	System / Big law firm / Finance	29 Apr 2013, 12:27:54	2	1	0

Dashboards

Business Development Dashboard

Pages:

Pick a site

Containers:

All containers

Start Date (dd/mm/yyyy):

24/10/2012

End Date (dd/mm/yyyy):

24/10/2013

[Update](#)
[Send](#)
[Schedule](#)

[Info](#)
[Print](#)

Business Development Dashboard

From 24/10/12 to 24/10/13

Most Engaged Domain

Email Domain	Campaigns Sent	Campaigns Open	Clicks	Engagement Score
gmail.com	256	136	786	1708
vuturegroup.com	147	91	39	169
vuture.co.uk	96	34	7	48
lw.com	8	6	0	6
tufan.co.uk	19	1	0	1
airberlia.com	1	1	0	1

Most Engaged Email

Email Address	Campaigns Sent	Campaigns Open	Clicks	Engagement Score
mattvuture@gmail.com	142	120	780	1680
matt.parfit@vuturegroup.com	84	46	24	94
edd.couchman@vuture.co.uk	83	25	5	35
us@vuturegroup.com	5	2	12	26

Least Engaged Domain

Email Domain	Campaigns Sent	Campaigns Open	Clicks	Engagement Score
abankingco.com	3	0	0	0
beneschlaw.com	1	0	0	0
tufan.co.uk	19	1	0	1
airberlia.com	1	1	0	1
lw.com	8	6	0	6
vuture.co.uk	96	34	7	48

Least Engaged Email

Email Address	Campaigns Sent	Campaigns Open	Clicks	Engagement Score
david.brady@vuture.co.uk	3	0	0	0
bblair@abankingco.com	3	0	0	0
jgurney@beneschlaw.com	1	0	0	0
gabby.malpas@vuturegroup.com	1	0	0	0

Dashboards

[Home](#) |
 [Admin](#) |
 [Reports](#) |
 [Help](#) |
 [Logout](#)

E-marketing Strategy Dashboard

Containers:

- / System / Big law firm / Antitrust
- / System / Big law firm / Appellate
- / System / Big law firm / Corporate
- / System / Big law firm / Finance
- / System / Big law firm / Health care
- / System / Big law firm / Litigation
- / System / Big law firm / Tax
- / System / Big law firm / Trusts & Estates

Start Date (dd/mm/yyyy):

24/10/2012

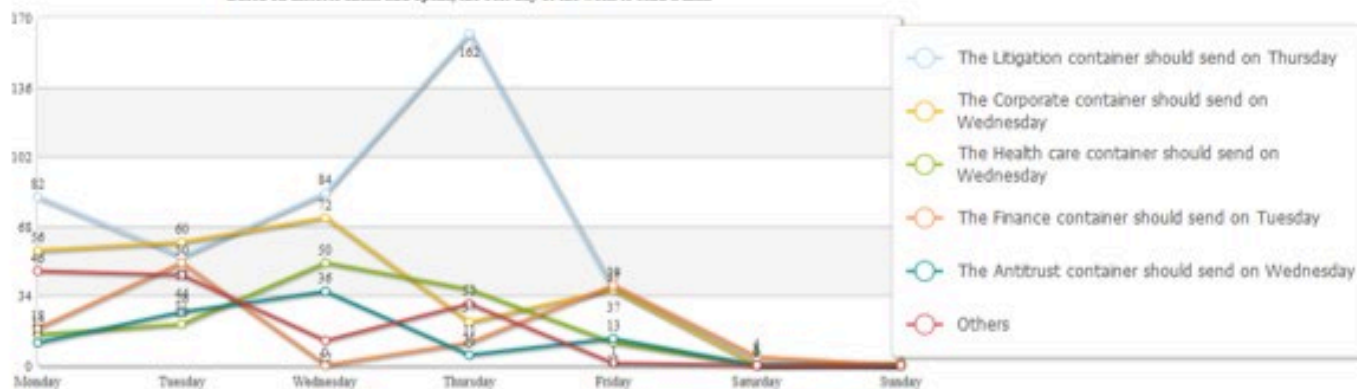
End Date (dd/mm/yyyy):

24/10/2013

[Update](#) |
 [Send](#) |
 [Schedule](#)

[Info](#) |
 [Print](#)

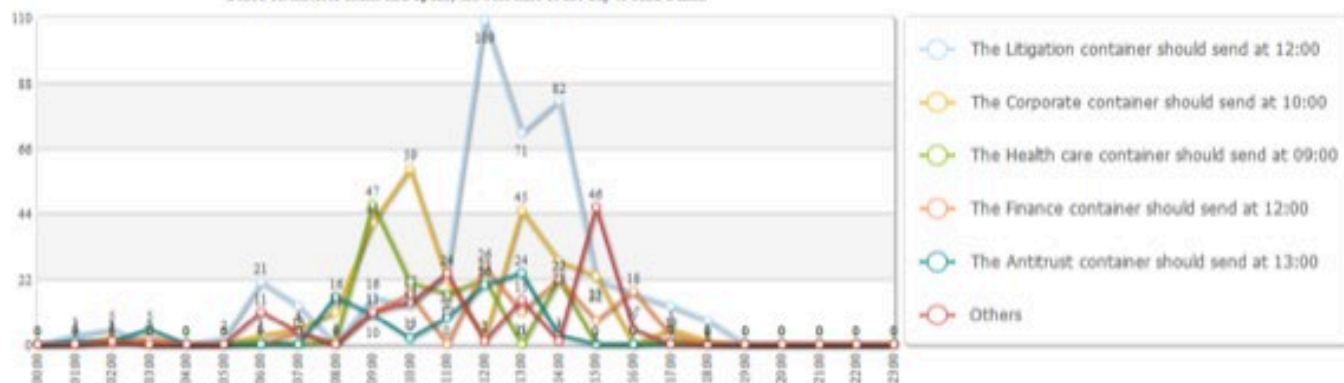
Based on historic clicks and opens, the best day of the week to send a mail



[Info](#) |
 [Print](#)

Hour of The Day

Based on historic clicks and opens, the best time of the day to send a mail



https://matt.vulturevs.com/reporting/?intDashboardId=5



Metrics for E-mail Marketing Success



Open Rates

- Can be deceiving due to the way they are tracked
 - Up to 50% of emails are delivered to subscribers unable to register opens
 - But they can still be valuable benchmarks
 - Open rates of 25%+ are considered good
- Highest open rates come from clients and former clients
 - Prospects are the lowest

Click-Thrus

- One of the best metrics of campaign success
 - Demonstrates engagement
- Have been in decline over the past few years
- Calls to action play a major role in motivating clicks

Unsubscribes

- By law, every commercial email must have an “unsubscribe” to allow opting out of future e-mails
- An increase in unsubscribes may indicate declining subscriber engagement

Bounces

- Hard vs. soft
- Review bounces monthly and correct or remove bad emails
- At it's simplest, create an Outlook account where all bounce backs go and establish rules to manage them
- Ideally, research every bounce back to try to correct information

Growing Relationships

For Business Development and CRM Success



CLIENTS
FIRST
CONSULTING

Event Marketing

Event Subjects

■ Positive words include

- ☐ Don't miss
- ☐ Exclusive
- ☐ Innovation
- ☐ ROI
- ☐ Registration

■ Negative words

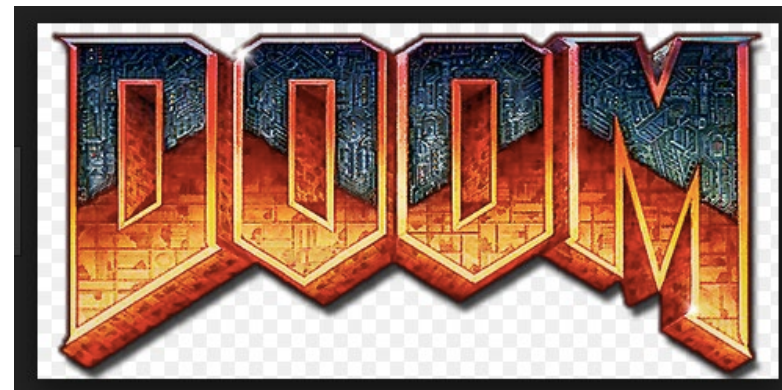
- ☐ Conference, exhibition, forum, webinar, training, learn
- ☐ Early bird, last chance

Event Tips

- Pull registrations into CRM
- Track preferences
- Consider whether you need to take credit cards
- Have links to add event details to Outlook
- Use the system to coordinate internal events



SPAM & Privacy – *What You Don't Know Can Doom You*



SPAM

- 62% of respondents cited “wasting time on nonessential emails” as the most challenging aspect of email use
- Getting reported as a SPAMmer enough times can take a big toll on deliverability rates
 - Preventing delivery of business e-mails to the recipients
- 3rd party blacklist organizations monitor spam

Anti-SPAM Rules and Regs

- Global anti-spam regulations in over 30 jurisdictions
 - Some require only limited nexus to the jurisdiction
 - Can apply where a computer system in the country is used to send, route or access a message
- Administrative monetary penalties
 - Canada's can be up to C\$1 million for individuals and C\$10 million for corporations
- Private rights of action in some places
 - United Kingdom, South Korea, Singapore, Mexico, Germany and France
 - Statutory penalties in some countries in the millions

Avoiding SPAM

- Send individual messages
 - Avoid using the firm's internal servers to send to groups
- Stagger delivery
- Minimize attachments
- Subject line must match the content
- From line must contain a real name
- Use sentence case or title case, not all caps
- No special characters
- Make unsubscribing easy
- Keep images appropriately sized
- Keep the ratio of images to text proportionate
- Avoid too many tables
- Text should not be the same color as background



Internal E-Mail Marketing - *Marketing the Marketing & Business Development Departments*

Market Success Stories Internally

[Manage Subscriptions](#)

BusDev Matters



November 2011

This Business Development Newsletter covers the firm's business development and pitch activity either through direct contact with the Marketing department or through the Marketing & Sales Certificate Reports. If you would like to request more information, have business development activity you would like to report, or have a story for future newsletters, please contact [Nick LoRe](#).

Please note that the information in this newsletter is highly confidential and should not be shared outside the firm.



Article Writing and Business Development

Article writing can be a great business development tool, driving traffic to the firm's website and allowing our attorneys and specialists to demonstrate their knowledge and expertise to existing and potential clients.

Many companies have come to Foley Hoag as a direct response to [articles](#) on our industry blogs. This fall, **Sarah Altschuller** was contacted by **QVC Inc.** to inquire about representation after reading her blog article "[Investors Release New Guide to California Transparency in Supply Chains Act](#)" on the firm's Corporate Social Responsibility and the Law blog. While we did not hear back from QVC, [we](#) were contacted soon after by global manufacturing firm [Acce](#) who independently read the same blog post. QVC had recently hired **Accenture**, who was now looking to engage us to advise on CSR issues for the home shopping company.

[an email from a](#) [ian Government](#) International Trade Negotiator and founder of **TradeWorthy**, a company that advises large corporations on their exposures to supply chain risk from an environmental, social/labor and governance perspective. The founder mentioned that he regularly reads the blog and [we](#) [n](#) discussing issues involving the mining and agribusiness sectors in Australia.

Our articles and blog posts also generate interest among publications and trade groups in key practices and industry groups. Our blog articles are also frequently republished in other external sources, providing further exposure to potential and existing clients. Recent blog posts from the Trademark & Copyright Law blog have been reprinted in the *AIP/PLA Newsstand* newsletter, and posts from the Law & the Environment blog are regularly being picked up by *Environmental Law360* and *Energy Law360*.



YEAR-END BUSDEV TIPS

1. Always send a personal note with a holiday card (e-card or paper card).
2. Always place a holiday call to top clients and contacts but know which holiday they celebrate before calling!
3. As clients pay our end of year bills, please call them and thank them whenever appropriate.

NEW YEAR'S BUSINESS DEVELOPMENT RESOLUTION

Resolve to touch all contacts in your network at least twice next year. Quarterly is best.



FOLEY HOAG LLP

BusDev MATTERS

This newsletter covers the firm's business development and pitch activity, either through direct contact with the Marketing & Business Development Department or through the Business Development Certificate Reports. If you would like to request more information or have business development activity you would like to report, please contact [REDACTED]

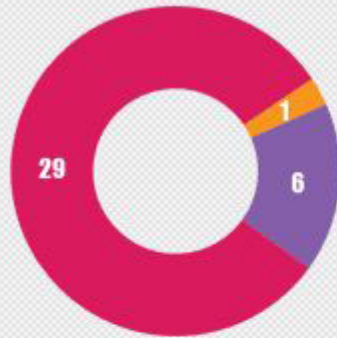
Please note that the information in this newsletter is highly confidential and should not be shared outside the firm.

July 2013 Statistics

The Marketing & Business Development Department was notified of [REDACTED] proposals in the month of July. Of these, the majority ([REDACTED]%) went to potential new clients. We successfully received business from all [REDACTED] of the proposals where we know the final outcome. We were also notified of [REDACTED] additional successful pitches from previous months.

THERE IS A LARGE NUMBER OF "PENDING" PROPOSALS! As a reminder, please notify [REDACTED] of the final outcome of all your business development efforts.

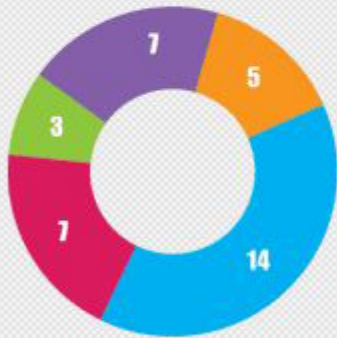
EXISTING vs. POTENTIAL CLIENTS



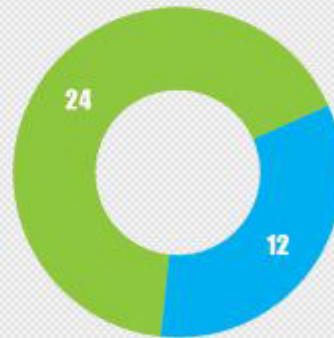
PITCHES BY INDUSTRY



PITCHES BY DEPARTMENT



PITCH STATUS



Data pulled directly from firm's proposal database

Link to PDF with pitch details (company name, contacts, attorneys, etc.) on firm intranet

Click [here](#) to download the most recent Pitch Report.



Getting Return on CRM and E-mail Marketing Investments



Putting the 'R' in ROI

- Results
- Revenue generation
- Reducing time spent on redundant tasks and processes
- Representing new Clients
- Retention of current Clients and attorneys
- Reports to drive business decisions
- Rewarding positive behavior
- Respect for the marketing department

Final Success Tips

- Be patient
- Don't try to do everything
- Small wins, communicate successes, repeat
- Involve end users
- Focus on best practices
- Don't reinvent the wheel
- Don't do it alone - reach out for help
- Subscribe to CRM Success

Growing Relationships

For Business Development and CRM Success



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Q / A



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