Committed to the Growth of Our Clients

CRM and E-mail Marketing Not Sexy, But Essential

Prepared For

LEGAL**MARKETING**ASSOCIATION
LMA®

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%

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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?

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 -

<u>and credibility</u>

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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For Business Development and CRM Success

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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

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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For Business Development and CRM Success

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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

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

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www.ClientsFirstConsulting.com

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

Edit   **Confirm**

Clean Up Contacts in Outlook

Get Time & Billing Telephone Popups

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
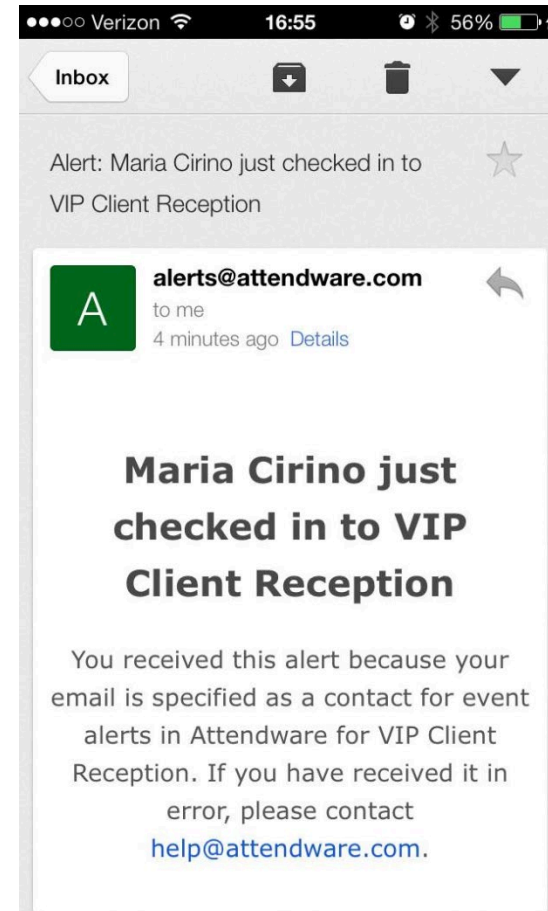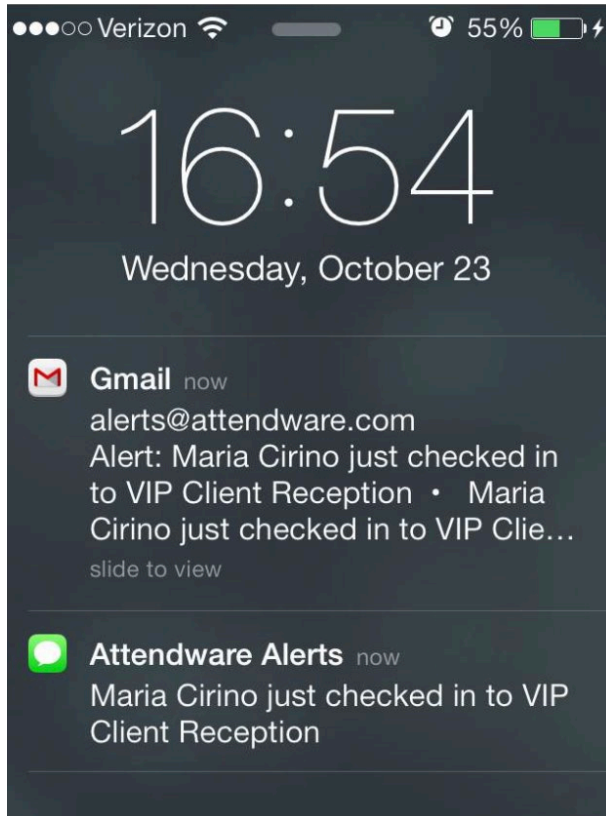
CHECK-IN STATS

Total Registrations: **1237** ✉

Total Check-Ins: **949** ✓

Total Walk-ins: **46** 👤

Total No-shows: **288** ✖

No-Shows: 23.3 %

Walk-Ins: 3.7 %

Pre-registered Check-Ins: 73.0 %

Save as image
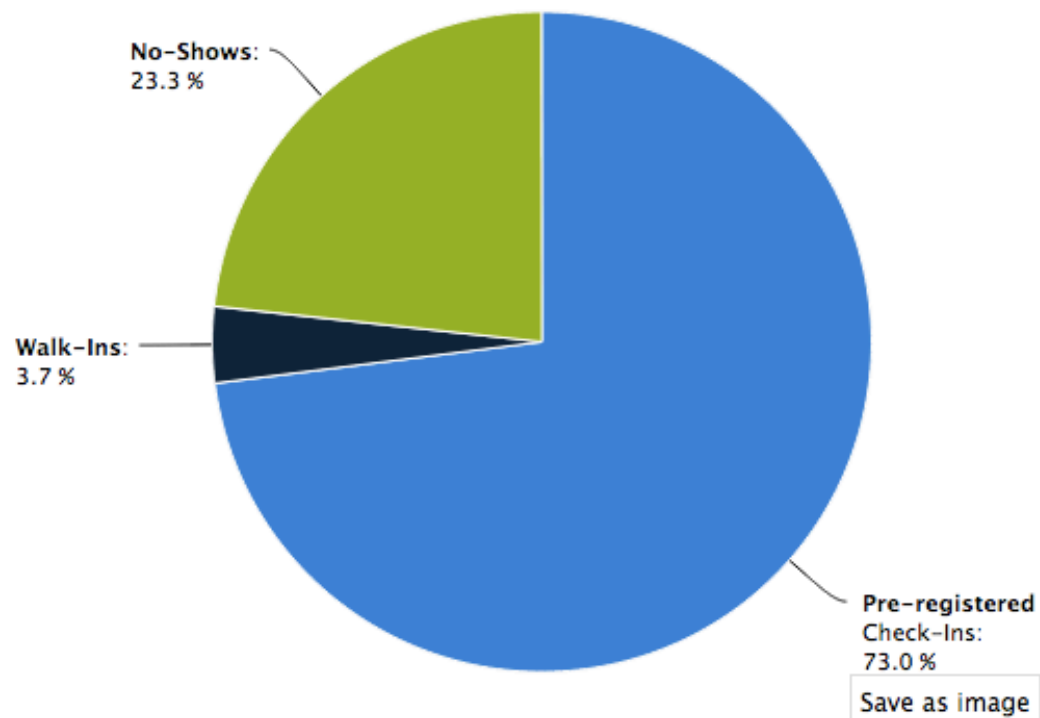
Pre-Event BD Analytics

From: Callanan, Audra
Sent: Wednesday, July 24, 2013 12:55 PM
To: Aber, Alexander; Block, Tom; Celorier, Marybeth; Collins, Jeff; Eckert, Matthew; Fiacco, 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, Unergraduate 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, OME	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		Governemnt 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

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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

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	Linked in
Construction (19)	Blackmore Brothers, Inc. (6)	✉ Blackmore, Henry (4)	✉ Higgins, Jennifer	6	🟠	in
Gas Utilities (1)	Sempra Energy (1)	✉ Krakskic, Petrov (4)	✉ Bannister, Brenda	5	🟠+	in
Construction (19)	Glengarry Construction (2)	✉ Farrell, Karen (2)	✉ Osprey, Andrew	5	🟠	in
Federal Government - Taxation (1)	IRS (1)	✉ Blankenship, Melissa (2)	✉ Plintz, Brenda	4	☐	in
Construction (19)	Kaszprzak Building Systems (4)	✉ Mansford, Bryan (2)	✉ Plintz, Brenda	3	🟠	in
IT Services (5)	Hansen (2)	✉ Victorn, James (1)	✉ Osprey, Andrew	3	🟠+	in
Multimedia Specialists (3)	Vectorz, LLC (4)	✉ Plantair, Freida (1)	✉ Higgins, Jennifer	2	☑	in
Property Management (1)	Briardayle Realty (1)	✉ Wendt, Teresa (2)	✉ Higgins, Jennifer	1	☐	in

LinkedIn Integration

LinkedIn Integration

LinkedIn Integration

E-mail Marketing CRM Integration

Constant Contact Integration

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:
levy

Company:

[Search]

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:

Telephone conference with Tim regarding Apple's acquisition of Microsoft.

Activity Date:
4/3/2013

Activity Type:
--Select--

Notes/Next Steps:

[Update]   [Cancel]

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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

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 ▾

1 Activity | Reports | View Printable Version

	Date ▽	Regarding	Activity Type	Summary	Originator
☐	4/3/2013	Contact	BD Phone Call	Telephone conference with '	Aber, Alexander J.

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 !

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
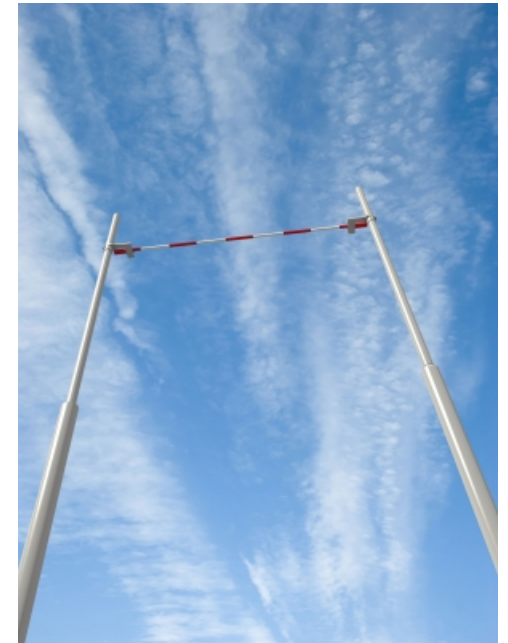
WARNING

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 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

The goal is **NOT** brand marketing

The goal **IS** content marketing
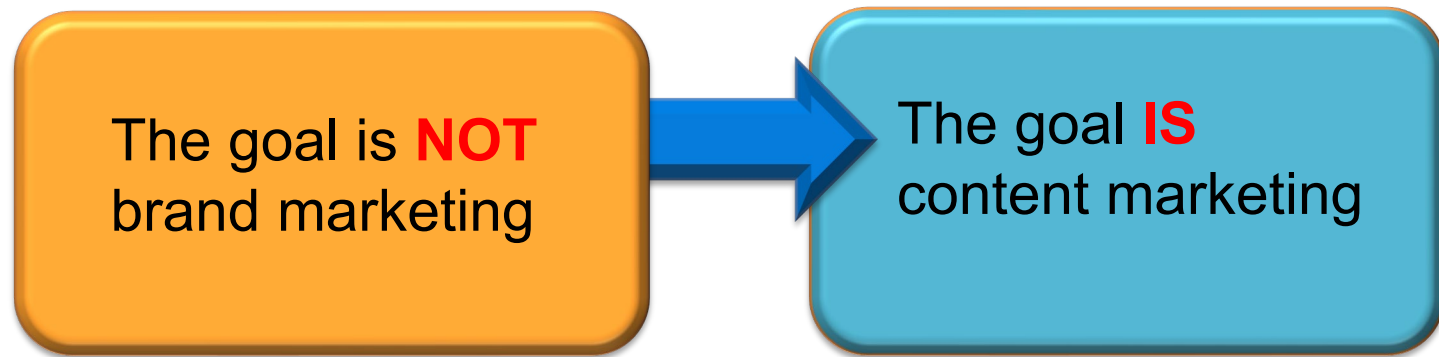
How Content Marketing Helps BD

- 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/Seminar

Webinar

Video Recording

LinkedIn Bio

Firm Website Bio

Individual Attorney Emails

Client Alert

Internal Education

Multiple Blog Posts

Article

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
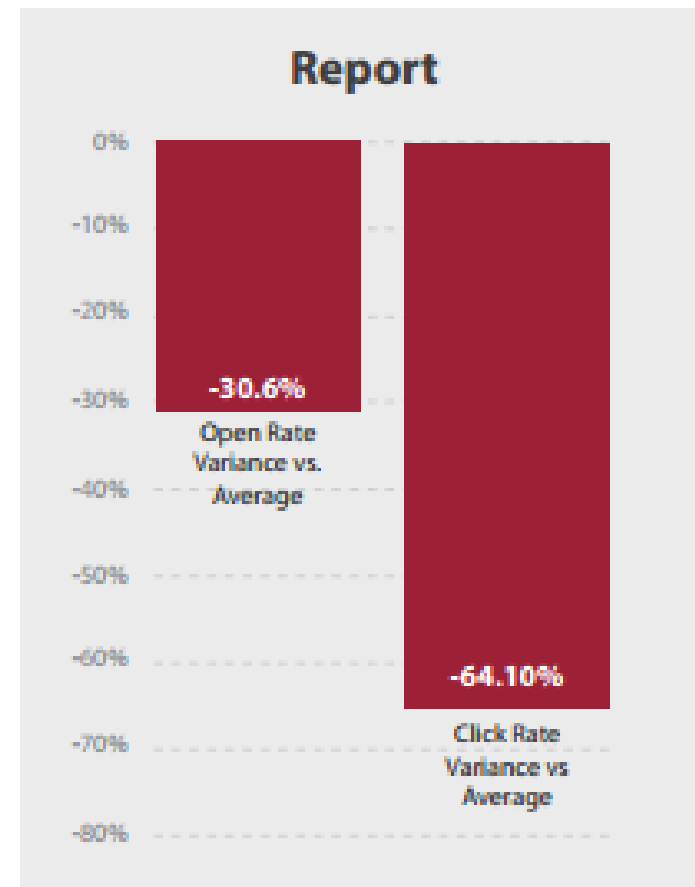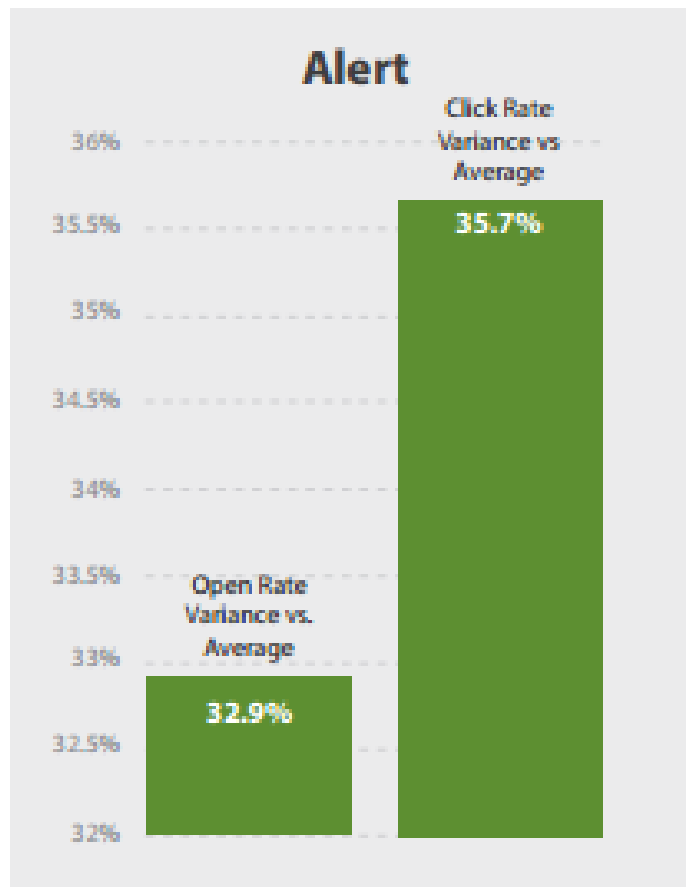
Interesting (and not so Interesting) Subjects

- 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

Growing Relationships
For Business Development and CRM Success

CLIENTS FIRST CONSULTING

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

CLIENTS
FIRST
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CLIENTS
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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
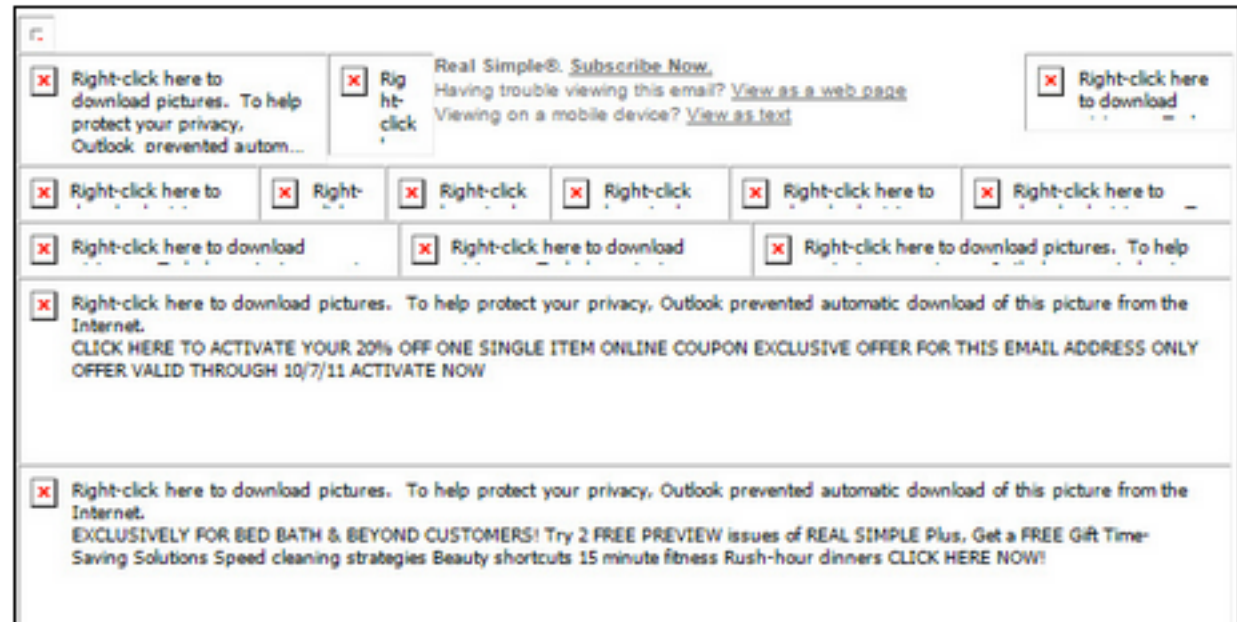
Right-click here to download pictures. To help protect your privac...

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

15% OFF CREDITS

Right-click here

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

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

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Analytics

E-mail Analytics

E-mail Analytics

E-mail Analytics

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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

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
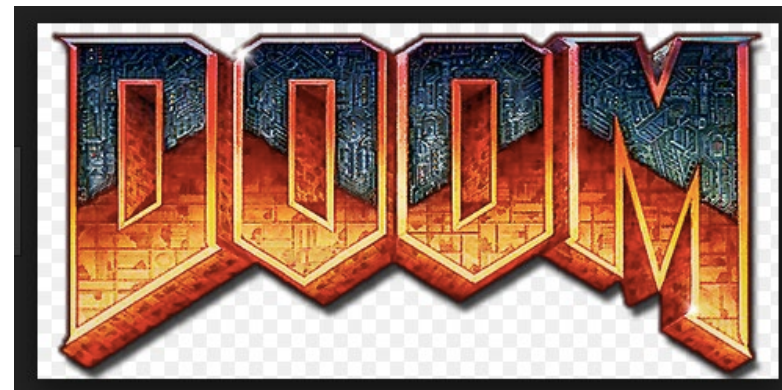
SPAM

- 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

BusDev Matters

FOLEY HOAG LLP

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 n   its 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 Cor   Social Responsibility and the Law blog. While we did not hear back from QVC   e were contacted soon after by global manufacturi   sulting firm Acce   ad 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 w   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 *AIPLA 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 ████████

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July 2013 Statistics

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

THERE IS A LARGE NUMBER OF "PENDING" PROPOSALS! As a reminder, please notify ████████ of the final outcome of all your business development efforts.
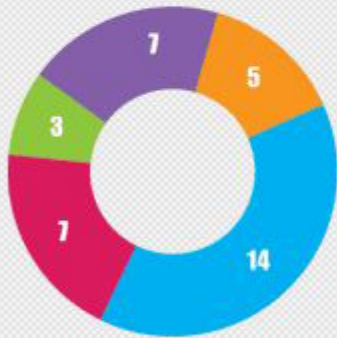
EXISTING vs. POTENTIAL CLIENTS

29 1 6
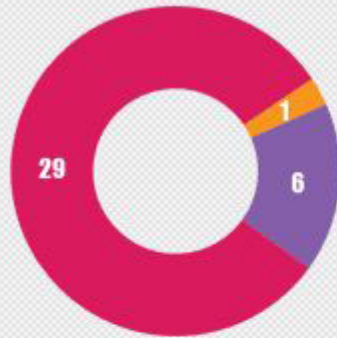
PITCHES BY INDUSTRY

11 6 2 2 3 13

PITCHES BY DEPARTMENT

7 5 3 7 14

PITCH STATUS

24 12

Click **here** to download the most recent Pitch Report.

FOLEY HOAG LLP
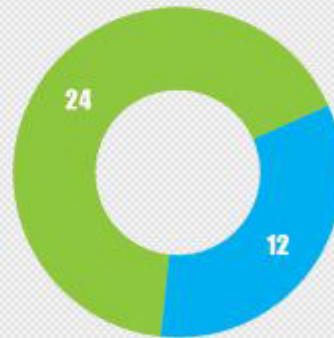
Data pulled directly from firm's proposal database

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

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

Q / A

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