

Outsourcing Marketing Technology Support To Boost Efficiency and Profits

But Is Outsourcing Right for Your Firm?

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Smart leaders are always looking for ways to make their firms more efficient and profitable. [Outsourcing some administrative functions](#), especially in areas involving some of technologies that support marketing and business development, can be an excellent option to improve operational efficiencies, enhance business development and ultimately increase profitability.



Three areas that are particularly well-suited to outsourcing are management of the firm's Customer Relationship Management (CRM) and eMarketing systems and cleaning and maintaining the firm's data. All three of these roles can be particularly challenging in a professional services firm. While this technology is critical to support the firm's marketing and business development efforts, because the technology is specialized, not everyone has the knowledge or skills to jump in to cover one of these areas when needs arise. Even if some team members are able to perform some of these tasks, they can take a significant amount of time – time that could be better spent attending to the more strategic needs and priorities of the department and the firm.

The Problems – and The Solution

Outsourcing marketing technology roles can solve a number of problems within the firm including:

- **Problem:** After investing in a new CRM system, many firms often underestimate the time and resources required to effectively implement the system. Additionally, some smaller firms may not have the resources to hire a full-time CRM manager.
 - **Solution:** An outsourced CRM Manager can be called upon to temporarily manage key areas of a rollout including scheduling meetings, coordinating efforts, managing staff, keeping the project on track, completing key implementation tasks, creating required communications and training materials, facilitating attorney and staff education and liaising with the vendors.
- **Problem:** During the rollout of a CRM, thousands, or hundreds of thousands, of records flow into the CRM from a variety of sources creating a deluge of inaccurate, incomplete and duplicative contacts. Poor data quality can cause adoption issues as attorneys and staff lose confidence in the technology, believing that if the data is bad, the system is bad.
 - **Solution:** Outsourcing the data management and cleansing function to a team of trained data quality professionals allows the firm to quickly clean, enhance and deduplicate records during a rollout. This also allows a firm the flexibility to staff data quality projects appropriately during the rollout and scale back when the initial heavy lifting is over.
- **Problem:** Bad CRM data causes issues with deliverability of communications and invitations.
 - **Solution:** Outsourcing the data management and cleansing function to trained data quality professionals allows the firm to cost effectively clean, maintain, enhance and categorize system data so that the firm and attorneys can effectively categorize and communicate with core constituencies to help support marketing and business development. This also relieves the

marketing team of the responsibility (and time) to hire, train and manage staff, allowing them to focus on more strategic priorities.

- **Problem:** The firm has issues effectively communicating with Clients and prospects due to a lack of strategy, staff or sophistication.
 - **Solution:** Outsourcing eMarketing management and/or support can provide the expertise needed to ensure that the deliverability of email campaigns and invitations can be maximized, that the CRM and eMarketing system integrations are working properly and that the firm avoids significant penalties associated with noncompliance with global and state data privacy regulations. Additionally, many outsourced eMarketing staff have experience consulting and working together with a number of firms and can help to develop a sound strategy to make eMarketing more effective.
- **Problem:** Staff members need to be out of the office for vacations, maternity, family, medical or other issues, leaving a huge hole in the firm's ability to manage the CRM system and team, communicate effectively, coordinate events or maintain clean system data.
 - **Solution:** With dedicated outsourced CRM, e-Marketing or Data Management support you know that you have a team at your disposal to assist whenever and wherever you have a short-term or long-term need or a hole to fill.

Additional Benefits of Outsourcing CRM, Data Quality and eMarketing

While many firms turn to outsourcing because it can provide substantial cost savings on staff overhead, pay and benefits as opposed to hiring internal team members, there are a number of additional benefits firms don't always consider, including:

- Outsourcing provides flexible staffing and support on a short-term, long-term or permanent basis.
- Outsourcing can give firms access to specialized technical and operational expertise.
- Outsourced professionals often have years of training on a number of CRM and eMarketing systems and can get up to speed quickly without the need for hours of specialized system training.
- Outsourcing providers should handle the supervision, oversight and quality review services.
- With outsourced specialists, budgets can be planned more efficiently.
- Outsourcing can help enhance staff retention by relieving valued and overextended team members of tedious or routine responsibilities, allowing them to focus on more complex projects or strategic functions.
- Some outsourcing providers also provide critical project strategy and planning services and can share information, ideas and best practices for success.
- Some providers offer industry-specific expertise that is sorely lacking in staff members from 'temp' services.

But Is Outsourcing Right for Your Firm?

There are many factors to consider before deciding to outsource CRM, eMarketing or Data Quality functions. To help determine if outsourcing is right for you, consider these four questions:

1. Why are you thinking of outsourcing?

If your existing staff is too busy with day-to-day tasks, processes and requests to focus on more strategic initiatives or goals, or if gaps in knowledge are preventing you from realizing the benefits of your marketing and business development technology systems, your team could likely reap a significant return from outsourcing.

2. What are the short-term and long-term goals you want to achieve or problems you want to solve?

Mapping out your goals and/or identifying problem areas in advance can help to clarify your needs and ensure that you enlist the right assistance.

3. Do you have the right team members with the right skills to accomplish the goals?

Hiring staff with the necessary experience and training can be prohibitively expensive, and finding good candidates can be challenging. If hiring or training are not viable options for filling your in-house skills gap, outsourcing is a good alternative and will likely even bring added value.

4. Is your need temporary or long term?

Outsourcing can bridge gaps when there are staffing transitions or skill deficiencies, fill needs related to special projects and help the in-house team to meet critical deadlines. Outsourcing can also provide the additional capacity to manage routine tasks and operations when teams are focused on major projects or organizational change.

Where to Begin

For firms considering outsourcing for the first time, a measured approach might be beneficial. Start by outsourcing some routine but essential functions such as CRM contact record cleanup and deduplication. Then, as confidence in outsourcing builds, you may want to tackle bigger projects such as industry categorizing of key companies, data migration from other systems into the CRM or categorizing key company records to help target and segment lists. In fact, many firms have been so pleased with the results and benefits of outsourcing for a project or initiative that they keep their outsourced staff on for a longer-term or even permanent basis.

With a reliable external team to handle specific essential functions, firms also experience fewer disruptions and gain operational stability and consistency and more streamlined workload management. These operational efficiencies lead to greater productivity and returns on marketing spend – meaning greater profitability for the firm.

To determine whether outsourcing is right for your firm, please reach out to [CLIENTSFirst](#) for a complimentary assessment at 404-249-9914 or info@clientsfirstconsulting.com. Our team is always at your service and happy to help.

- For almost 15 years, the team at [CLIENTSFirst Consulting](#) has been supporting professional services firms and other organizations with [highly trained and experienced outsourced CRM, eMarketing and data quality staff](#) and [strategic consulting services](#).