When Attorneys Ask, "What's In It (CRM) For Me?"

-By Rachel Fields and Chris Fritsch, CLIENT Success Consultants

Most law firms have a CRM system, but few can say that they are actually getting return on their CRM investment. How much value a CRM provides in a law firm depends on attorney buy-in. If your firm wants to increase CRM adoption, you have to show them not just why CRM is important for the success of the firm, but *what's in it for them*. Here are some suggestions for demonstrating real value for your attorneys.

For CRM to succeed in a law firm, the attorneys first need to understand that if they commit some time to CRM, it can make their professional lives easier and less stressful and give them have better control of the business development process - and increase their earnings.

Make CRM Easy to Understand and Use

But they also need to understand specifically how CRM will help them achieve these results. Every attorney is different, and each wants or needs different things to be successful in their day-to-day practice. The way to get CRM adoption is to spend time with each attorney or key groups of attorneys to find out what they need to be more successful. What problems could be solved by CRM? What processes could be automated? What information could be provided to enhance their business development efforts?

Then the CRM needs to be configured to meet specific attorney needs. The beauty of CRM is that it can do a thousand things. Realistically it should only do two or three – and those things can be different for each attorney. Take the time to build real value for the attorneys. Once the CRM begins helping groups of attorneys succeed, more attorneys will begin to want to use it.

Another key to getting attorneys to buy-in is dedication of resources to support their use of CRM. In a law firm time is money… literally. Busy attorneys who bill hundreds (or sometimes more than $1000) per hour often can't (or won't) spend the time to fully utilize the CRM system themselves - and this may not be the most effective use of their time anyway. Often the best way to get ROI on CRM investments is to dedicate additional resources to get attorneys what they need to succeed. This may include the time, money and/or people they need to help them get information - and value - from the system.

Succeeding with CRM is not fast or easy – and it may look different for every firm. But getting attorneys to recognize what potentially is in CRM for them and getting them to use it can build a groundswell of support and have the next attorney or group knocking at the Marketing department door, asking "What's in It For Me?"

Give Them What Matters Most

Based on almost 15 years of experience working together with top professional services firms, here are some of the key CRM benefits that attorneys find most valuable.

- Correct, current and complete contact information when they need it

- A list of other firm attorneys who may know a contact or have a relationship (and, ideally, who has the strongest relationship) with a company and may be able to provide information or make an introduction
- Marketing and business development activities involving a contact (especially when the activities can be automatically generated based on calendar appointments and expense submissions)
- Notifications of contacts changing jobs, receiving firm communications, attending events and meeting with other attorneys at the firm
- Creation of contacts from the signature blocks of emails to improve efficiency and reduce attorney effort
- Mobile access for searching and adding contacts, activities and notes
- Insights into opportunities to cross sell services or develop additional business with clients and contacts
- Automated reminders to facilitate client communication and follow-up
- Dashboards and reports that allow easy access to contacts and business intelligence and that can be pushed to attorneys on a regular schedule
- Key information and business insights about contacts and companies
- Information on pitches and proposals to contacts or companies, which other groups or attorneys may be working on
- Referral tracking to identify the best sources of incoming business and ensure that attorneys reciprocate
- Business card scanning technology to allow quick contact entry when out of the office

These features can be extremely useful to attorneys, yet CRM can still be a hard sell for some. There can also be a few attorneys who may have had a bad experience with CRM in the past or require special handling. (What marketing professional hasn't been on the receiving end of complaints about problems with mailing lists?) But overall, if you can show attorneys how CRM can help to solve problems, save time and increase revenue, most will be willing to participate. It's up to marketers to educate their attorneys about what's in CRM for each of them and to make CRM the tool attorneys want to use to help them be successful.

- For more than a decade, the team at CLIENTSFirst Consulting has been helping professional services firms and other organizations successfully select and implement CRM and eMarketing systems to maximize value, adoption and return on investment. If you need help achieving CRM Success, please contact us at 404-249-9914 or Info@ClientsFirstConsulting.com.