

## CRM Themes and Branding Campaigns

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One of the primary goals of CRM success is participation. To gain firm-wide adoption, it is essential that CRM users want to use the system. To reach high levels of participation requires that CRM users be interested in, and even enthusiastic about, the rollout.

One of the best ways to drive enthusiasm is to adopt a CRM theme. Rolling out a CRM system, especially in a large firm, takes time and effort. Promoting the rollout with a brand or theme can help maintain momentum during this process.

Some themes that have been successfully adopted at other firms include:

### Themes

#### Make it Rain / Let it Rain

- Focus on enhancing the firm's business development or 'rainmaking' efforts
- Promotional Items: branded umbrellas, raincoats, iTunes songs like "Singing in the Rain," "I'm Only Happy When It Rains," etc.

#### Get FIT (Firm Information Tool)

- Focus on enhancing the firm's marketing communication and business development efforts to 'strike it rich'
- Promotional Items: energy bars, whistles, pedometers, jump ropes, salad cups, dumbbell stress relievers, exercise bands, fitness club memberships, stopwatches, squeeze balls, footballs, baseballs, basketballs, etc. iTunes songs related to fitness and energy.

#### Lottery

- Focus on enhancing the firm's marketing communication and business development efforts to 'strike it rich'
- Promotional Items: lottery tickets, scratch off cards, power 'balls', lottery type banners and signs, raffles etc.

#### Connections / Kevin Bacon

- Focus on making and maintaining connections and relationships that lead to new business
- Promotional Items: puzzles, connect the dots games, Kevin Bacon photos, Kevin Bacon movie DVDs, etc
- Use the system to see how many Kevin Bacon connections people are away from other people they want to connect with

#### Teamwork / Our CRM Team

- Focus on favorite sports teams
- Promotional Items: team t-shirt, jerseys, tickets to sports events, footballs, baseballs, basketballs, iTunes songs like "We Are the Champions." etc.

#### Turning Up the Heat on Business Development

- Using CRM to enhance firm business development efforts

- Promotional Items: thermometer gauges to track progress, mini thermometers, sunscreen, sunglasses, parasols, island items
- iTunes songs like “Feeling Hot Hot Hot,” or “The Heat Is On”

### **CRM Olympics**

- Making CRM a fun competition for everyone
- Promotional Items: Medals, flags, hockey pucks, basketballs, volleyballs, water bottles, targets
- Make a high jump bar that can be raised as levels of participation are reached or give medals for Gold, Silver and Bronze contest winners
- Use the Olympic theme

### **Building**

- Focus on building business or relationships
- Promotional Items: branded building blocks, Legos, pictures of skyscrapers, magnetic building puzzles, etc.

### **Firm Growth**

- Focus on using CRM to enhance firm growth
- Promotional Items: seeds, plants, seeded paper or business cards, bamboo sprigs, etc.

### **The Future / Back to the Future**

- Focus on the future of the firm after CRM vs. the past before CRM
- Promotional Items: Back to the Future DVDs, model DeLorean cars, spaceships, iTunes songs from the movie,
- iTunes songs like “My Future’s So Bright I’ve Gotta Wear Shades,” etc

### **CRM Fitness**

- Focus on getting the firm or contacts in shape using CRM
- Promotional Items: whistles, pedometers, jump ropes, fitness club memberships, stopwatches, squeeze balls, footballs, baseballs, basketballs, etc.

### **On Target**

- Focus on better targeting of Clients, communications, etc.
- Promotional Items: large bull's-eye posters, desk magnetic dart boards, coasters with targets on them, etc.

### **Treasure Hunt**

- Focus on finding hidden treasure – and business – utilizing the CRM system
- Promotional Items: chocolate doubloons, logo sword pens, eye patches, etc.

### **Time Is Money**

- Focus on time saving and efficiency of the system
- Promotional Items: clocks, stopwatches, chocolate coins, gift cards, etc.

### **Woodstock**

- Focus on peace, love and harmony - using CRM to bring the firm together, Taking Woodstock DVDs, etc
- Promotional Items: vinyl records, iTunes songs from the era, etc.

**Christmas In July**

- Focus on getting ready for holiday card – in July
- Promotional Items: snow globes, Christmas lights, candy canes, wrapped gifts, gift cards, Christmas ornaments and decorations, etc

**Extreme Makeover**

- Focus on using the CRM to make the firm better including enhancing contact information and improving list management
- Promotional Items: Extreme Makeover season DVDs, other items from the show, etc

**Max**

- Taking business development and relationship building to the “Max”
- Promotional Items: Max Power Bars, Max Energy drinks

**Popular TV Shows**

- Build a theme around a popular show like “Relationship Apprentice,” “Project CRM,” “CRM Survivor” “Amazing CRM Race” etc.
- Promotional Items: season DVDs or iTunes downloads of the show, materials or songs from the show etc.

**Engineering Our Future**

- Consider an engineering theme for firms with a focus on supporting engineers or IP firms that have attorneys with backgrounds in science
- Promotional Items: branded pocket protectors, tape measures, calculators, protractors, compasses, etc.

**Supporting Materials for CRM Branding**

- Signs
- Flyers
- Mugs
- Posters
- Break room materials
- Firm swag
- Umbrellas
- Key chains
- Flashlights
- Sports balls
- Stress balls
- Swag from CRM vendors
- Coasters
- Puzzles
- Games
- Party favors
- QR codes
- Awards for achievement

**Other CRM Ideas to Enhance Adoption and Improve Processes**

- Use PostIt notes to attach to business cards at conferences to quickly write where someone met a contact and what lists to put them on

- Create a friendly competition between offices for contact cleanup or categorization and keep track of levels of the offices
- Detail real life stories of successes to build enthusiasm
- Use CRM to make cross selling connections when new attorneys join the firm
- Require CRM use for getting out all new partner announcements
- Have CRM 'ambassadors' in each office who are experts and can help others
- Get people to search for key information about lawyers or Clients in the CRM
- Use CRM to monitor information about key firm contacts such as job changes, promotions, etc.
- Make CRM a repository of company intelligence by providing detailed information about Client companies such as news, business, financial and industry information
- Enhance the CRM with ERM information to make it a repository of relationships
- Use CRM to maintain connections with firm alumni