

## Redefining CRM Success

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*Getting professionals to input or manage contacts in CRM has always been a goal - and a real challenge. It's time to reset those unrealistic expectations and redefine the concept of CRM success.*

As CRM Success Consultants, one of the questions we most frequently ask our clients is “What would successful CRM look like for your firm?” Asking stakeholders to define CRM success is an effective way to uncover current pain points and also helps to understand where they are currently versus where they want to be. We see many common threads in their answers, such as “fewer manual processes,” “less reliance on spreadsheets,” “greater efficiency” and “better sharing of information.”



But one of the top answers we hear most frequently is that success would be better attorney adoption of the CRM. When pressed on what they mean by adoption, most stakeholders say that they would like to see more attorneys actively contributing contacts to the system, looking up information, running reports on their own – and, ideally, adding information such as activities and notes to their contact records. (Spoiler alert: most attorneys won’t do any of these things!)

### **The “CRM Adoption = CRM Success” Paradigm**

How did we get to the point of expecting lawyers to actually “use” CRM? In short, because it’s their information in the system – their clients and contacts and their relationships with those people and companies. A system called Client Relationship Management presupposes the existence of clients and relationships, and that information is entirely dependent upon the lawyers who have the clients and those relationships – the elusive “who-knows-whom” information that firms are always trying to capture and use.

Legal industry CRM has always been about making it easier to transfer all this contact and relationship information from lawyers’ address books (or heads) into a central system that could facilitate the sharing of the information throughout the firm. This is why marketing technology evolved from requiring lawyers to push a button to synchronize their Outlook contacts, to a no-click-required synchronization (but with lawyers still controlling which contacts get shared). But even while CRM systems could be configured to “auto-magically” pull in all contacts as a way around the human roadblock, many firms didn’t take advantage of this option and were left with diminishing returns as fewer and fewer contacts were actively shared with the central system over time.

Then there is the added wrinkle of lawyers not keeping up with their contact records. Instead of taking the time to update their Outlook address books, they often simply search their email for the last communication with a contact and hit reply or find a signature block to pull a contact’s phone number. Either way, the net result is that CRM systems that rely on the lawyers to do ANYTHING additional – regardless of how few clicks or keystrokes that may entail – are becoming more and more inaccurate and under-populated over time. The contacts and relationships – the C and R of CRM – often don’t even exist in the system that is designed to manage that exact information.

## The “CRM Adoption” Reality

The truth is that the firms that define CRM Success by attorney adoption are setting themselves up for disappointment if not failure. Why? Because time is money in a law firm – literally – and learning to use CRM and entering information into it require spending non-billable time, which most lawyers are not willing to do. There are other reasons too: some more senior lawyers are not interested in learning new technology, many CRM systems are not user-friendly and can be difficult to navigate and, for the vast majority of firms, there is no mandate (or sometimes even encouragement) from firm leadership for lawyers to use the CRM system. This is one of the main reasons it's estimated that [up to 70% of CRM implementations fail to meet expectations.](#)

Is CRM “failure” the fault of the lawyers, the technology, or just unrealistic expectations? One of the benefits of working in the legal marketing technology industry for so long is the perspective we have gained from years of experience with law firm marketing technology. After seeing hundreds of firms experience what they consider “failed” CRM implementations, it may be helpful to redefine success and acknowledge that firms may be less disappointed if they had more realistic expectations.

Over the last few years, a new technology has emerged that has proven to be a game-changer: Enterprise Relationship Management (ERM) systems. ERMs were developed to harvest the vast quantity of meta-data available from email traffic to answer the simple question that [CRM](#) alone has failed to successfully answer, which also happens to be the cornerstone of marketing a professional services firm: who knows whom and how well? These [ERM systems](#) create relationship information between a contact and the lawyers in the firm they are emailing. This relationship information is based on the recency and frequency of emails between a lawyer and a contact. Some systems can also be configured to include calendar appointments in calculating the strength of a relationship.

Unlike CRM-based who-knows-whom identification, which was strictly a snapshot, dependent solely upon capturing which firm member *shared* a particular contact and therefore (it was assumed) *knew* that contact, ERM systems can dynamically calculate strength of a relationship over time. Practically, this means that relationship reporting with ERM is going to be more reliable in the long term because it is designed to reflect real-time changes in communication patterns. For example, a partner may have a relationship with a client today and because of their frequent communication related to a matter, the strength is calculated to be a 5. But if the matter ends and their communication becomes less frequent, the partner’s relationship with that client may drop over time to a 2. Meanwhile, a new partner working with the same client on a new matter will see their score increase the more communications are sent.

ERM systems also include an essential function called signature capture or scraping, which allows the system to create a contact record based on the contact's email signature block. Now, we can automatically create complete and fairly accurate contact records that contain first name, last name, job title, company, email, phone number and sometimes even a physical address. This saves the attorneys (and/or their assistants) considerable time because all they have to do is continue with their daily work, aka billable client work. Basically, ERM let's lawyers be lawyers.

It's important to note that while the information captured from a signature block is often actually superior to Outlook contact data, which can be incomplete, incorrect or dated, ERM systems are not perfect, so some human review by a trained [data quality professional or data steward](#) is essential to ensure that the data is captured accurately.

## **CRM System Use Redefined**

The good news is that with many of the CRM systems with ERM functionality, the lawyers don't even have to be licensed users of the CRM. They will be 'using' the system just by doing what they normally do, communicating regularly with clients for business or business development. They can now be essentially removed from the CRM data input process and are no longer required to create, update and share their contacts and relationships. Meanwhile, Marketing and BD professionals can now get the information they need to effectively communicate, target and segment. By eliminating the "CRM adoption" roadblock, we have new freedom to define new metrics that are meaningful and can actually support business development success. Now that's success.

Now that Enterprise Relationship Management (ERM) systems can be implemented to identify relationships and allow contact records to be created and updated in a CRM without additional work on the part of the professionals or their assistants, we have an added opportunity to redefine what a successful CRM implementation would look like.

It seems like we have forever been defining CRM success in a Professional Services firm as adoption, aka the number of professionals who are "using" the system – and using has been defined as logging in and entering information like contacts, notes and activities.

With the new CRM-ERM model, CRM adoption no longer needs to be interpreted this way. Instead, adoption can mean using CRM data to inform business development decisions and help with managing relationships with Clients and prospects. Suddenly, adoption equals value, which is a win!

However, this paradigm shift from users entering data to users leveraging data does pose a few challenges, which necessitates a discussion of the role – and importance – of communications and training in CRM success.

Just as the users' role in CRM has been transformed by the arrival of ERM systems, communications and training must also be adapted to accommodate the new CRM-ERM landscape. While we've always advocated taking a "what's in it for me" approach to communications and training – where the professionals were told "if you do this, then you get that" - now we can focus on *what* they are going to get and *how* they can use the information. It's much more "carrot" and much less "stick" because they don't really need to DO anything to get the data.

## **Communications**

Without the need to brace professionals for learning new technology and changing their behavior, the tone of communications regarding the CRM initiative can be more "ta-da!" (as in, check out these benefits) and less "to do!" (as in, here's what you need to do.)

Additionally, if you start to plan and build key reports as the ERM is being implemented, you can circulate that information to the professionals sooner than was previously possible. It can be helpful to provide them with a menu of sample reports to get their interest, such as relationships with top Clients, strongest relationships with key contacts, increasing relationship scores or potential at-risk Clients where scores are declining, client team connections and/or "lonely" clients with no or few relationships

connections. Presenting professionals with these types of reports may get them excited, and a few of them may come back to you with edits or even new report requests. Another win!

### **Training**

Similarly, training no longer needs to focus on the mundane tasks related to data entry. Instead, professionals should be shown how to interpret and use the information in reports, which is a much more engaging conversation. Some professionals may even be interested in learning how they can self-serve these reports. Others may want their assistants to generate them. Of course, there will still be a few who want Marketing to send them the information, but frankly, if they are requesting and using information from the CRM, consider that another win!

### **The Endgame**

The arrival of ERM technology is a game-changer for CRM adoption. By eliminating the need for professionals or their assistants to be involved in the process of entering and updating contact information, the definition of “adoption” can be converted from professionals doing (non-billable) time-consuming and tedious data entry to professionals using the data to enhance their marketing and business development efforts. Now that’s a win!

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*For more than 10 years, 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](mailto:Info@CLIENTSFirstConsulting.com).*