April 19, 2021 • Publications • www.atllp.com

USING YOUR CRM FOR MORE THAN JUST A CONTACT DATABASE

Legal Marketing Association (LMA) Midwest
By Monica Kriegel, Senior Marketing Manager

For most organizations, a Client Relationship Management (CRM) system makes life easier by tracking interactions and supporting the sales funnel by acting as a contact database. But when appropriately integrated into your operations, a CRM has the potential to be so much more.

For Armstrong Teasdale, a newly implemented CRM system has not only simplified processes, but it has also more than modernized the way our Marketing, Business Development and Information Resources team operates. It's made intangibles tangible (the soft side of marketing, often hard to quantify) and has afforded us, and firm leadership, new perspectives on our global efforts. It has—perhaps even somewhat to our surprise—become the living, breathing core of our team.

By integrating multichannel efforts on one platform, from event planning and client entertainment to nominations, social media and even budgeting, we're able to more accurately report on our team's efforts and demonstrate ROI (both in quantity and quality) for things that have long been considered "soft" metrics in the marketing field.

The following five tips will help you think about CRM tools differently and just may uncover surprising opportunities to drive value throughout your organization.

1. **Invest in your technology – and your people.** Over the last year, many firms have slashed budgets to address the uncertainty associated with COVID-19. But now—perhaps more than ever—it's important to continue investing in marketing and business development. Given today's competitive market, infrastructure and human capital investments have proven to provide a significant advantage to firms that have chosen to stay the course and invest in their strategy during times of unpredictability. Getting buy-in from firm leadership is the first step—and a critical one—in advancing the business objectives and strategic goals set forth.
2. **Beware too much of a good thing.** Our marketing team is in the CRM

system together, all of the time. Throughout the day, we can have multiple users leveraging the platform simultaneously and connecting dots in real-time. This provides countless advantages. But be sure to balance putting “everything” in the system without putting in so much information that it doesn’t get used or becomes too cumbersome. You can quickly over-engineer your processes while trying to be everything to everyone. Are you really going to track that for hundreds of attorneys? Take the time to think through processes and the real problems you are trying to solve, and you will be happy you did. The balance will look different for each firm based on how your plan to use it and who will have access.

3. **Expanding user rights isn’t always right.** For us, keeping access to the platform insulated within our department was a strategic decision – not necessarily right or wrong. However, some firms may wish to roll the platform out to attorneys, or even other staff departments. Depending on your firm’s size, you might put in a significant amount of effort to get everyone up and running, only to end up with a handful of power users and countless data hygiene issues. Remember – you can’t have your cake and eat it, too. More users mean more data, but it also means less control. That said, the system’s reporting capabilities allow us to keep attorneys and other staff departments in the loop quickly and easily. We can export PDFs and trend charts to share our progress and add value across functional areas.
4. **Say hello to macro-managing.** Using your CRM system as a one-stop-shop allows supervisors and managers a window into what’s happening teamwide and even firmwide—again, in real-time. Project status reports are available with the click of a button (better yet, automatically generated). Chasing things down with a team working across geographies and time zones is suddenly less complex. From a managerial perspective, that ability to take a step back and get a holistic view is incredibly valuable.
5. **Ask the right questions.** “Can this be improved or made more efficient by adding it to our CRM?” The answer is, more often than not, “yes.” By leveraging the tech embedded in our CRM, all of our systems can now talk to one another. Evaluate your system requirements when looking at a platform. Does it integrate with your email client? How about your firm’s website? What about ERM and financial information? But remember, it isn’t always just about the high-tech integration. Sometimes, the most impactful changes are low-tech. Do you need to leverage another spreadsheet or manually generate a report? The upfront investments you make in process efficiencies are invaluable in the end.
6. **BONUS – Remember, everything is negotiable.** Contracts that come

through our door, especially those requiring significant investment from the firm, are expeditiously and thoroughly reviewed by our contract attorneys to ensure the terms are favorable and align with our business objectives. Though we may sometimes feel like honorary attorneys from the countless advisories and proposals we've drafted, every contract should be reviewed. Every. Single. One. These are significant investments and you should ensure you are getting what you paid for and have the protection if you don't.

Utilizing our CRM platform for actions well beyond business development has allowed us to ditch dozens of unwieldy, data-driven spreadsheets. We've re-envisioned the content within and how we use it and link it to other platforms or functions of our team across the country.