How to make your CRM work for you

Jennifer Faivre
CRM & Rankings Research
970.596.0259
jfaivre@jaffepr.com

If you are like most law firms across the country, you have a CRM – Customer Relationship Management system – in place. A CRM is more than a glorified Rolodex or database. The purpose of a CRM is to help your attorneys, marketing and business development personnel, PR team, and support staff manage interactions with current and future clients in the hopes of increasing your client base and, ultimately, profits. However, a recent survey by the Managing Partners' Forum and the Thriving Company shows that six out of seven law firms are failing to get substantial and sustained benefits from their CRMs. Are you making your CRM work for you? Here are four ways to make your CRM more productive.

1. Provide adequate training.

Obviously, you need to ensure that people know how to enter information into the system. But training should go beyond the basics of teaching your attorneys and staff how to add a name and address. Users have to become fluent with the system so they understand the benefits of using it – why and how the information entered will be used. Extensive training will build familiarity and confidence for the users and translate into higher use.

2. Start using it!

43% of those surveyed felt that, in their firms, CRM use and maintenance is the responsibility of the marketing and business development staff. However, those same people also believe that the fee earners (read: attorneys) are mainly responsible for developing and maintaining customer relationships. If the lawyers are the primary relationship builders, then it makes sense that they also need to be actively involved in CRM use.

3. Create buy-in.

To get the most out of any CRM system, it is important to maximize its use, including getting your attorneys to use the system. This means convincing firm members that they will see concrete results by using your CRM system. Play up the benefits of your system. Show how its use of facilitates sharing and collaboration about existing and future clients. Convince lawyers that sharing their knowledge about whom they know will, indeed, create value for themselves and the firm. Sharing this knowledge also promotes a more strategic approach to client services and business development. Other benefits of a CRM include: an improved customer experience, focused marketing efforts, automated analytics and reporting, and better coordination and cooperation.

4. Make the most of your data.

Once your CRM is populated with customer information, here are just a few ways to use it:

- Eliminate duplicate records and update outdated information.
- Create a targeted mailing or event list.
- Promote collaboration between staff, teams and practice groups.
- Search for clients and explore relationships.
- Review past activities and create new opportunities.
- Target and close new business.

Be sure to stress these uses and benefits with attorneys!

If you'd like more information about maximizing the capabilities and marketing opportunities provided by a CRM system, feel free to contact me at jfaivre@jaffepr.com or connect on Google+.