

## 10 Tips to Maximize Marketing and Business Development Technology Value

- 1. Want to improve CRM use and adoption?** Focus on communication of system benefits and one-on-one training customized to individual user needs.
- 2. Trouble coordinating business development and marketing efforts?** Enter activities into CRM to track touches and promote coordinated business development.
- 3. Trying to reach the right audiences?** Use marketing automation to customize message content and delivery and set up a subscription center to let your audience choose the communications and invitations that are relevant to them.
- 4. Need to improve Client teamwork?** Use CRM to organize team members, track activities, set reminders and provide progress reports.
- 5. Focused on growing and leveraging relationships?** Utilize CRM and ERM systems to identify who has the strongest relationships with key companies and contacts.
- 6. Want to know more about Clients or prospects?** Enhance data in the CRM with competitive and business development intelligence to gain insights, spot business development opportunities and share relevant information with attorneys.
- 7. Dealing with duplicative, incomplete or dated data?** Outsource data cleanup to easily and cost-effectively clean, complete and correct contact information.
- 8. Frustrated with your CRM system setup?** Review the system configuration to enhance system performance and efficiency.
- 9. Trouble finding or hiring experienced technology staff?** Utilize consultants to assist with short or long-term staffing needs.
- 10. Overwhelmed trying to keep up with this technology?** Reach out to a partner for help...

Managing marketing and business development technology can be a full-time job. CLIENTSFIRST helps firms ensure system value, adoption and return on investment. **Contact us to schedule a complimentary Marketing Technology Discovery Session**