

# CRM REPORT

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**legal**   
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# □ CRM of the Crop

## A look at all the latest trends in the legal CRM space

Talk to many heads of business development or IT directors about their legacy client relationship management system and you are you're very likely to need a few minutes to let them download about how badly utilised their system is and why it Simply. Doesn't. Work. If any legal technology can be said to put a smile on people's faces, this isn't it.

While many of the issues that law firms battle with are, by their own admission, cultural, the biggest criticism levied at legal tech vendors in the CRM space is that there has been a) a lack of innovation in its broadest and most undefined sense and b) the absence of a viable cloud-based CRM - until recently.

In a market long dominated by LexisNexis InterAction and, to a slightly lesser extent, ContactEase, the legal sector has over the past three years seen something of a shakeup including:

- the arrival of Salesforce-based CRM system OnePlace on the legal scene in 2016;
- the launch by Peppermint Technology in 2018 of its Microsoft Dynamics 365 based CRM online;
- the acquisition by Intapp in November 2018 and April 2019 respectively of DealCloud and gwabbit to integrate with their growing cradle-to-grave portfolio of products;
- The acquisition by SAGlobal of LexisOne from LexisNexis: SAGlobal has said that it plans to integrate LexisOne with its Legal360 CRM system, which is based on Microsoft Dynamics 365.
- The integration by Tikit of InterAction and Introhive's automation and relationship intelligence platform (with signature scraper) into its own Tikit eMarketing Suite.

- The steady growth in awareness of Introhive's auto-population technology, which integrates with CRM tech including InterAction and OnePlace;
- The recent launch by LexisNexis of InterAction for Office 365 in a long-awaited move to the cloud
- And let's not forget that Thomson Reuters has end-of-lifed 3E Business Development, still better known by its pre rebrand name of Business Development Premier, or BDP.

These developments come as, or perhaps because, CRM is being elevated from a 'nice-to-have' to a 'really-must-have' and rising further to the top of law firms' business development heads to-do list, as the acquisition and retention of clients is increasingly determined by the quality of digital engagement. Whereas once, outside of the more stereotypically institutional relationships, clients have very much been the preserve of individual lawyers, there has been a visible shift towards the law firm owning those relationships to make them 'sticky'.

The key now is zero entry, and Legal IT Insider analyst and legal technology consultant Neil Cameron says: "We all know that the biggest problem with CRM systems is that lawyers don't trust the data, and yet are too busy, or lazy, to undertake the irreducible minimum of effort required to keep the data up to date. This results in a vicious cycle of increasingly inaccurate data, and further reducing lawyer effort. That is why the automated signature scraping functionality in CRM systems has been a game changer, and is the single most important facility in any CRM system: the data grows in size and accuracy with little or no effort from lawyers, and their confidence in the data also grows accordingly. Result!"



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# The Shake Up

Formed largely of ex-InterAction senior leaders led by founder and CEO Tim Smith, OnePlace, which is underpinned by Salesforce, broke onto the scene with some gusto in 2016 signing - as we were the first to reveal - Bird & Bird as a client. Larger client wins since then have included Reed Smith and DAC Beachcroft, and we hear there are more in the pipeline.

The client lifecycle management system, as it prefers to be known, enables users to access the Salesforce ecosystem of apps, which is extremely popular. Many point out that Salesforce is an unnatural platform for the professional services sector. At Intapp, practice group leader within the professional services group, Darryl Cross, says (see page 10 for the full interview): "Salesforce is a product designed for the way a corporate works: an account owner selling product to a group of individuals within a clear chain of command and it works well like that. That's not how professional services firms work. There are multiple constituents at the firm and at the client. Salesforce struggles to support that." Cross adds: "Salesforce is an extremely powerful tool but it's way more than lawyers' need. It's complicated and requires a lot of input - a step backwards in relationship management and an admission that the firm can't use a CRM."

We spoke to Womble Bond Dickinson about OnePlace, which it rolled out in September 2017. Before the merger, Womble Carlyle used InterAction, whereas Bond Dickinson didn't use a CRM. Client programme manager Jo Henry, tells us: "We took the opportunity to go with a blank sheet." The firm liked OnePlace's interface; the fact it is cloud-based (and therefore benefits from automatic updates and reduces IT commitment); and the fact that it is intuitive and requires less training. "It's a very intuitive system so better for us," says Henry.

After selecting the system, the firm effectively locked OnePlace in a meeting room to work through their processes, including which processes could be replicated that are currently done in a manual way. "That way we shaped our system so it became ours rather than just a bolt on and we have continued to do that," Henry says.

OnePlace comes in for praise in terms of their support and the firm is notably a fan of the Salesforce

## OnePlace comes to town

platform, Henry says: "That was part of the attraction - it's the biggest CRM system globally, so you knew that while OnePlace was new it was underpinned by a strong product that is constantly being invested in. "I appreciate that it's not as commonly used by professional services firms but having OnePlace on the front end does a lot to address that. We're trying to use it now to drive a pipeline approach and to have a more methodical approach to selling and reinforcing those behaviours. The system enables us to capture opportunities and associate activities, which really helps.

"Quite often we tell lawyers to cross sell, but this makes it more systematic. If you have an opportunity, what are the next actions? What do we need to do next for that to lead to fruition?"

Are there ways that the Salesforce platform just doesn't work? "The thing with Salesforce is that it's so huge and there are so many different apps you can make the most of or you don't have to use them. Where we have challenges is more around changing behaviours, which is not specific to OnePlace or Salesforce.

Interestingly, Henry says that integrating the firm's CRM into their pricing processes is helping to break down barriers. OnePlace is now part of the pricing process and how we scope out work: it's not just seen as a standalone CRM," Henry says.

Automation of data entry - or lack of - is a big complaint by CRM users but Henry says: "OnePlace integrates with Intapp and Aderant, and we are testing a side bar in Outlook to simplify adding data in there. There are various options you can use to integrate OnePlace with your contacts in OnePlace but we've chosen not to do that: people can choose to add their contacts themselves."

The firm will look at a system like Introhive but that is on the not immediate roadmap and Henry says: "We're not there at the moment. With OnePlace there are so many lovely shiny things but we're trying to focus on our core priorities so that we have a firm foundation."

One immediate priority will be rolling out the new HTML5 Lightning interface over the summer.

## David Lee, IT director, Womble Bond Dickinson

"Our adoption rates for OnePlace were very high at the start. Salesforce not that long ago rearchitected their platform to give it a new interface call Lightning which brings a modern graphical user interface, developer platform and is much more engaging. Once we complete our move to Windows 10 we will change our default browser to Chrome and that will enable us to turn on the Lightning interface and we'll have another push on OnePlace adoption. It doesn't matter what you use, you have to continue to work at it and success is not always immediately visible to the people putting the work in; pipelines take a while to come through. It needs people to continually drive adoption."

"Whereas InterAction requires specialists to manage the data, in OnePlace the fact that it's built on Salesforce opens you up to a whole ecosystem of plugins to manage your data and records. You're not just reliant on product updates to provide new features but have a whole ecosystem from one of the biggest SaaS platforms out there, including a number of third-party products to help you manage and integrate your CRM."

# Peppermint Technology launches standalone CRM online

Peppermint Technology has gone through a number of incarnations to its Microsoft Dynamics based ERP offering but the last couple of years have seen a significant shake up both in terms of how law firms can acquire it (it has become modular) as well as management, with the introduction of an experienced C-Suite.

In October we spoke to Microsoft about Peppermint's new CRM online product, Peppermint Business Development, which it launched early in 2018, prompting Microsoft's enterprise sales manager Matt O'Callaghan to say: "I've seen a huge shift in Peppermint between the beginning of this year and now in terms of their capability around CRM online.

"Peppermint were in our eyes a small to medium business partner, but they have shifted gears. They have new leadership focussed on looking at the future platform and moving into the cloud space. There has been a lot of feedback about CRM online from traditional customers but a lot of interest from Big Law and [chief strategy officer] Tony Cox has been engaged in opportunities around that."

Twelve months ago, Peppermint brought in Gary Young as CEO and Tony Cox as CSO, shortly followed by Nicki Grundy as CFO. Together with Mike Walker, Peppermint's CTO, the team has secured new investment not just from existing shareholders SEP, but also from AKKR, a leading Silicon Valley technology-focused investment firm.

Thanks to the launch of Peppermint Business Development, which is designed to automatically deliver optimised sales insights and actions for the fee earner, Peppermint is experiencing particularly strong interest from large law firms seeking to modernise.

One attraction is the fact that in Peppermint you can leverage the Microsoft stack. Young told Legal IT Insider: "Firms need agility and for their platform to be agile and able to drive change. Microsoft owns Teams and Flow and Power BI and we can pull that in and integrate it into our native Microsoft platform. When I present to firms and demonstrate Flow and Teams - that you can set up a matter in Teams and can run it in there - people eyes widen. The platform piece in Microsoft is becoming very powerful."

## Gary Young, CEO, Peppermint Technology

So why is CRM such a hot topic in the legal sector?

- **Competition.**

Client expectations are growing, the competition is rapidly evolving – especially new entrants and new business models, and clients are ruthlessly churning to achieve better service and value. For firms that don't quickly embrace AI powered secure cloud technology such as Peppermint Business Development, the market opportunity is shrinking fast.

The acquisition and retention of clients is increasingly determined by the quality of digital engagement. To compete, firms have to modernise. Legacy CRM solutions simply cannot cut the mustard –they are increasingly vulnerable to security breaches and requiring costly integrations to delivery relevant functionality.

- **Churn.**

That may seem obvious, but it is clear that client retention is a significant problem. The problem for firms is that gaining new clients takes significantly more cost and effort than retaining them. So the combination of lost revenue and the ever increasing cost to replace it has a material impact on firm profitability – assuming a firm has both effective business development capability and fee earner capacity to recover.

BTI Consulting reports that firms lose four out of 10 of their top clients every year – and for some firms the rate is much higher. The pace of technology change continues to accelerate, so preventing churn is going to get tougher as time passes for those firms with legacy solutions.

- **Adoption.**

CRM systems exist, but prospective clients report they are often little more than a database, used for Christmas card lists and other basic marketing purposes. Furthermore, users have to log in separately with little practical benefit, so it takes concerted effort to record information. Use is typically in silos and only taken up by marketing and business development departments.

The lack of mobility and widespread adoption critically limited the benefits of CRM to firms seeking to retain and grow their client base.

- **Data Quality.**

The real problem with legacy CRM solutions, and some more modern examples, is that they do little to enhance the quality of a firms underpinning data. Through lack of adoption, poor design and integration these solutions hamstring firms – critically limiting their ability to make the most of what they have.

## □ Carey Olsen talks CRM

Carey Olsen went live on Peppermint Business Development in June 2018, and in the first four months, 6,000 new contacts were added; open rates were up by 55%; and click rates by 26%, while undeliverables went down by 14% and unsubscribes by 70%.

James Prouten, group head of technology at Carey Olsen, said: "We looked at Microsoft Dynamics but out of the box, it doesn't cater for the legal marketing model, perhaps specifically as that applies to offshore. A good portion of our business comes from referrals from intermediaries, which required some configuration of Dynamics, and there was no concept of the legal client and matter model in the system. A bespoke configuration became pricey and complicated to deliver. That is where Peppermint became quite attractive. The last thing we want is a bespoke CRM, which would be costly and challenging for a small technology team to deliver and maintain. The Peppermint model is attractive: while we went for an on premises model for this implementation, we were keen to make sure that we had a direct route to the cloud available for when the time is right for us to move over to that model."

"We felt that Peppermint certainly provides more automation than InterAction as it has Dynamics' workflow capability built in. Peppermint can either configure it for us, or our internal staff can configure it. We haven't gone crazy with the workflow but it's there and available. Our Peppermint project was tightly scoped, but we'll take it further in the future. I wouldn't be surprised if we start looking at a more sophisticated workflow tool soon."

"In our part of the world there is a recognition that there is considerable opportunity by improving the way we go out and sell, and to be able to move to more of a sales model we need highly capable technology to underpin that."

Anna Coombs, brand & marketing communications manager at Carey Olsen, said: "Our last system was little more than an address book, not a CRM and people did not use or trust the data. It is now seen as a business-critical system - a central hub, which allows us to be joined up and share intelligent and rich data."

She adds: "Just four months in, we really started to see the benefits. Internally people could see the change happening - we worked hard to bring people along on the journey and engagement increased considerably in months three and four post-implementation."

To maximise the value of their technology investment, Carey Olsen undertook an early exercise to cleanse their existing CRM data. It was imperative to ensure they started with clean, relevant, valuable and manageable CRM data; built for their growth strategy. Prouten said, "It became a transformation and remediation project plan at the same time."

He adds: "We were attracted by Peppermint's Microsoft based platform, which would make the implementation and integration process a simpler technical exercise for us. Microsoft investment and the ability to leverage that technology through Peppermint was a key decider for us and was aligned to our strategy for future business growth."

"The robustness of the Cloud platform was important to us too, as was easy Microsoft office suite integration."

CRM is only part technology and Coombs said: "Managing the change and cultural shift internally was critical. Ensuring that we issued regular firm-wide communications to keep employees up-to-date on the project helped."

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## □ Intapp buys DealCloud

August 2018 saw Intapp acquire professional services CRM DealCloud, which has since won Baker McKenzie as its first law firm client.

Significantly Intapp this year also acquired Introhive competitor gwabbit, a West Coast-headquartered enterprise relationship management solution that captures and updates data from emails. Given that lack of automation in the data entry stage of CRMs is where many fall down, the acquisition is smart. Gwabbit is already used by law firms such as Skadden, Arps, Slate, Meagher & Flom; Latham & Watkins; Sidley Austin; Jones Day; Cravath, Swaine & Moore; as well as Boston Consulting Group and Navigant.

DealCloud has around 100 employees spread across its New York headquarters and North Carolina offices.

In addition to exposing Intapp to new financial institution clients, it will neatly integrate with recently launched client onboarding tool Intapp Experience and Intapp's president Dan Tacone told Legal IT Insider at the time of the acquisition: "Business development is now at the front and centre of law firm priorities and after launching Intapp Experience, it felt like a good thing to round out our offering. For us it's about filling out the platform in a comprehensive way."

Gwabbit, which was founded in 2008 and has 75 professional services clients, helps to improve the quality of contacts stored and determines their strength, based on recency and frequency of contact. Relationship intelligence algorithms evaluate interactions between firm employees, prospects, clients and other third parties to build a detailed picture of who knows whom and the strength of those relationships.

Based on the data stored, gwabbit will also prompt users to get in touch with important people that they haven't contacted for a while.

It is part of Intapp's strategy to develop AI-bolstered, zero entry CRM. The idea is that gwabbit will enhance the information in DealCloud. While the CRM is very much US-centric right now, the intention is that it will become global.

Bakers, which will swap out InterAction, is already a client of Intapp's professional services platform, which it uses for new business intake, experience management, conflicts management, time recording, confidentiality management, workflow and data integration.

Speaking to Legal IT Insider, global chief operating officer Jason Marty said: "We have seen a shift among law firms towards enterprise software. I've been sceptical of CRM systems, but we've had a different experience and in DealCloud there is a new approach.

"It's been developed for financial institutions and professionals managing groups across entities where work is referred and done in a professional context and not a linear way. DealCloud gives you views across the various sectors and practices and locations and role types, which by itself is attractive but then Intapp provides the integration."

Intapp's conflicts solution is integrated with external corporate information from Dun & Bradstreet and Marty said: "It gives you many configurable angles on your data," adding, "We don't have to populate it, it's much more than a CRM." On the other hand, others in the know have said that it is not "really CRM" at all.

While DealCloud is new to the legal sector Marty said: "DealCloud lives in 400 institutions, it's not like we're buying new software."

## **Daryll Cross** **Practice Group Leader,** **Professional Service Firm Leaders and Partners** **Intapp**

"I've been working with CRM in legal since 2001 and did my masters on it and there are couple of big distinctions. There's CRM that's built for the manufacturing sector such as Salesforce and Oracle and SAP, which work well if you run that sort of business, but law firms are not those kinds of businesses. Then there's CRM designed for the legal industry, but the question is how simple it is to use and how well designed. The bottom line is that if you're not going to get the results you want you might as well go back to spreadsheets."

"CRM should be a collaboration tool to allow lawyers and business executives and clients to collaborate. Not just a data warehouse that we pile stuff into. That's a major mistake. When you combine what a lawyer needs to manage their five biggest client and then multiply that across the firm, it becomes incredibly powerful.

"The thing I've heard from lawyers and marketers is that they can't get lawyers to add the data but all day long they put data into time, matter, document, and case management systems. So, if we can just keep track of who they are emailing and use machine learning to track that, it becomes very powerful.

"CRM was used as a way to outsource activity you didn't want to do such as buy gifts when you didn't want to waste your valuable time - it was always seen as useful but optional. People with nothing to lose would do it, but not those that had something to do. Lawyers had to be either bribed or threatened, just like getting children to eat their brocolli by covering it in cheese.

"What has changed is that law firms can't react fast enough to client demand and new competitors and clients are demanding that they collaborate. They can't do it all in their head and keep up with the speed of demand.

"Richard Susskind gave a talk at Intapp Insights and he said no-one buys the drill; they buy the hole it makes. When it comes to cross selling, people don't come to a lawyer because of a contract problem but because they want to expand or build a manufacturing plant in China with all the laws and multiple aspects of legal practice that entails. Going a la carte to lawyers is something the general counsel no longer wants to do - law firms that collaborate will get that work and those that don't are becoming commoditised."

## □ SAGlobal acquires LexisOne

At the start of the 2019 we revealed that LexisNexis was to sell ERP LexisOne to SAGlobal. The acquisition was completed in March, and LexisOne becomes part of the Legal360 stable, offering providing Microsoft Dynamics 365 practice management, finance and accounting and business development solutions for law firms.

In an interview with Microsoft Dynamics World, Whit Mclsaac, CEO – Americas for SAGlobal said: “We will be rebranding our entire legal solution portfolio under the Legal360 brand for continuity purposes and will take these solutions to market directly through our SAGlobal offices in 20 countries.

Enterprise relationship management and intelligence will feature highly including zero data entry through AI, and advanced relationship analytics leveraging Power BI.

SAGlobal has been investing heavily in its Legal360 CRM suite, and will continue to bring enterprise relationship management and relationship intelligence capabilities to the market, according to Mclsaac. This includes incorporating advanced strategies for passive data collection.

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## □ Tikit integrates with Introhive

In 2018 Tikit announced that it is to expand the value of its marketing software portfolio: Tikit eMarketing providers users with a single point of data entry into InterAction to enable firms to develop more business.

Introhive scans interactions through Outlook, including emails, contacts and calendars. When it picks up a mention of a contact that is not in the CRM system, it will send the user an email asking for permission to synchronise the data into the CRM system.

With the recent addition of an optional email “signature scraper” to the Introhive platform, law firms can now use the market-leading data enrichment service to identify more contacts and relationships than ever before.

Introhive’s clients include Reed Smith, Howard Kennedy, and Fenwick & West as well the likes of accounting giant PwC and Grant Thornton.

It integrates with both InterAction and OnePlace as well as Microsoft Dynamics 365.

## THE CLOUD

*“When I started out in the industry years ago, most of the CRM software was very legal specific and very vertically focussed. It was hosted and installed inside the firm’s firewall, but in the last few years we’ve seen firms finally willing to adopt cloud technology and we’ve seen some of the leading CRMs from outside of our industry enter our market with more verticalized and cloud-based solutions.”*

**Chris Fritsch, president of CLIENTSFirst Consulting**

*“The CRM market is changing and one of the big changes is that cloud CRM systems are entering the market and challenging the incumbents.”*

**James Prouten, group head of technology at Carey Olsen**

# LexisNexis launches InterAction in O365

In what was described as a “really important but initial step”, LexisNexis on 8 April 2019 launched InterAction for Office 365 after an 18-month development project that has involved the entire InterAction team from product management to development and engagement with over 150 law firms globally.

The newly launched product, which is available for both desktop and subscription versions of Office, embeds CRM data into existing workflows across Microsoft Outlook, Excel and Word.

Speaking to Legal IT Insider, commercial director for EMEA and APAC, Steve Zangari said: “We have been really involved with clients in deep research to understand what law firms are looking for from their CRM solution.

“We’ve conducted and formed engagements with over 150 law firm globally to find out what is important to them. What are the barriers to success? How will we help them to derive the maximum value? We’ve conducted story mapping; formed a CIO advisory board; and established a global client advisory board. There has been real in-depth engagement with the client.

“The focus has very much been around CRM adoption and what’s happening in the background to help us formulate our strategy for InterAction going forward.”

The application is delivered through a hybrid cloud model that enables a cloud-based application to securely access data (without storing it at rest) regardless of where it resides – on-premises behind a firewall, in a private cloud or in a public cloud environment. This hybrid model is a key tenet in the future of InterAction and Zangari said: “Underpinning it all is a hybrid cloud concept. One of the hottest topics right now is the adoption of cloud-based software and firms are at different stages driven by both internal factors and client considerations.

“We’re aligning ourselves with that journey and with the hybrid cloud architecture we can support any firm. The critical piece is ‘where does the data reside’ and we’re leaving that with in the hands of the law firm but giving them the benefit of a cloud application with consistent and seamless updates and the ability to run the platform from any application.”

InterAction for Office 365 includes features like one-click VOIP calling and the option to automatically

track phone call and e-mail activities. The broader integration with Word and Excel saves time for fee earners as well as marketing and business development professionals. "For example, users can easily compare an attendee list with their InterAction data to understand which known contacts will be at an event without ever leaving Excel," says Scott Winter, director of product management. "This isn't about assembling a report but rather embedding InterAction data to help users work smarter in real-time. Further, with the hybrid model, we can get functionality to our clients faster than ever before while letting them maintain control of the data."

For many users, a strategy review can't come fast enough and InterAction, which LexisNexis acquired in 2004 with its acquisition of Interface Software, is plagued by criticisms of a lack of innovation.

Speaking to Legal IT Insider, Nathan Hayes, IT

director at Osborne Clarke, an InterAction site, said: "Our CRM meets our basic requirements, but I don't think anyone gives it a rave review and it's definitely CRM 1.0. The way everyone wants to do CRM is that we gather data without actively having to ask fee-earners to provide it. We want to gather these metrics behind the scenes, but it doesn't do that. It requires an enormous amount of heavy lifting to get the data into the system and that's not the way we want things to be.

"People expect it to happen based on their diary and there is none of that. When we come to look for our next CRM a major factor will be the automation of gathering of our data."

While an O365 version is most certainly moving the product in the right direction, Hayes says: "InterAction in the cloud is a hygiene factor: I wouldn't expect anything less."

## Thomson Reuters Elite sunsets 3E Business Development

Any consideration of changes to the CRM market would not be complete without mentioning Thomson Reuters Elite's decision this year to sunset 3E Business Development, the CRM it launched in 2013 but that has suffered from a lack of uptake.

The CRM, which is based on Microsoft Dynamics, is used by around 30 clients in the US and in the UK only Brodies has gone live on system.

SAGlobal has announced two service offerings to support BDP clients:

- Microsoft Dynamics support services to assist current BDP customers with general support and ongoing enhancements of their BDP CRM system
- A discounted formal migration program to assist current BDP customers in migrating to Microsoft's standard Dynamics 365 CRM platform configured with the industry-leading Legal360 CRM suite

Mclsaac said: "Unfortunately, Thomson Reuters BDP customers need to make an important decision about the future of their firm's CRM platform. Whether they decide it's best to continue using BDP for a period of time or are interested in migrating to the Legal360 CRM alternative, our team is eager to help these firms."

Speaking to Legal IT Insider, Chris Fritsch, president of CLIENTSFirst Consulting, advised: "This is an excellent opportunity for those clients to really look at their needs before jumping in and buying a new piece of software."

## Thought from the market

**Dan Bressler,**  
CEO Meridius and former vice president of marketing at Intapp

“There’s clearly fresh focus and investment turning to CRM, which offers exciting new potential, possibility and promise. However, tempering that excitement is the stark reality that CRM as a category carries a lot of legacy baggage — particularly in the minds of many lawyer practitioners.

“New technology may indeed pave the way for a more perfect picture in the future. That future may include getting greater returns on existing investments, finally cracking data quality, data silo and data integration challenges, and effectively harnessing the promised potential of AI and analytics.

“But I think it’s important to look at the “Key P’s” at the start of any CRM journey — policy, process, people and first principles.

“All are important, but the last one is critical. Without a shared internal agreement on their specific problems, priorities and objectives, firms risk placing too much emphasis on a general hope that this particular trip will be different.”

## □ Culture or technology?

As with any technology there are limits to what it can achieve unless combined with a clear strategy. While the ‘zero entry’ concept certainly goes a long way to overcoming fee-earner time issues, it will not help a partner feel any happier about sharing his or her contact details.

Firms are also waking up to the need for honest dialogue about what the newer technology is capable of and at one Am Law 100 firm, the director of competitive intelligence says: “AI is going to have an impact. Is it going to bake you a pie today? No. And technologists do law firms a disservice by letting people believe that. We need more candour and rational, fact-based discussions and understanding by our lawyer leadership. There is so much buzz around AI and the fact is that it might reduce the number of mechanical tasks but it must be trained and it’s just a dumb machine that will do dumb machine tasks faster. If your workflow is finding a client name on LinkedIn then you have a perfect universe if you have a CRM that can automate that search and present back a

possible match. But what it can't do is tell you that the third person on the fifth page has changed jobs or if 'Lesley' is spelled wrong: you still need human intelligence."

For many firms, CRM is low on the list of a long list of priorities. But things are changing. We're seeing increased adoption of data analytics and law firms' appetites have become greater for those aspects of CRM that help them to really understand their relationships: where do their relationships lie; how are they engaging with those relationships. It is really interesting to see that change. In practice lawyers now have a different perception of relationship management, which is becoming central to the practice."

The days of the market accepting that CRM is largely shelfware appear to be coming to an end, but law firms need to consider carefully how they move forward.

Fritsch says: "We've gotten to a point where we need to think of CRM as strategy as much as a technology. CRM really focuses on firms' most important assets - their relationships. In the last few years, so much new technology has been created that is essential to help a firm manage and leverage its relationships such as enterprise relationship management (ERM) and some of the new experience products. Additionally, eMarketing software is all about expanding relationships. In a law firm where time is money and clients are so important, we have to be able to be able to manage those relationships. I think we've reached a point where one technology may not be able to do it all."


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