Three Law Firms Tackle Data Quality

Chris Fritsch
Law Technology News
November 18, 2008

Print Share Email Reprints & Permissions Write to the Editor


Image: PhotoDisc

There may be no client relationship management project quite as challenging as data migration and **de-duplication**. If approached without a plan, it can be a daunting, seemingly endless task that drains firm resources. But in reality, data quality isn't a task -- it's an ongoing project.

Three law firms tackled these issues, and learned valuable lessons, during recent rollouts of **ContactEase**, a client relationship management program from Cole Valley Software. Each firm took a very different approach, and their experiences offer many lessons:

• Detroit-based **Clark Hill**, with 180 attorneys, 147 support staff and five offices.

• **Ulmer & Berne**, with 185 attorneys, 250 support staff and four offices, headquartered in Cleveland.

• Omaha, Neb.'s **Baird Holm**, with 75 attorneys, 75 support staff and one office.

ARMS AND LEGS

Clark Hill chose a manual data quality process. Jim Henderson, manager of client services, says his firm went "arms and legs" to avoid committing additional funds to the CRM rollout.

In July 2007, the firm began with 65,000 contact records and finished the rollout and data cleaning process within 10 months -- without additional resources, new technology or hiring data stewards.

Instead, Henderson worked with the firm's Human Resources department to build a data cleaning team that included 10 secretaries and receptionists.

To roll out the new system, team members would get together to work on data cleanup over lunch, or whenever they had spare time. The total cost of the data cleaning included the hours spent on the project by his team -- and quite a few pizzas.

A key lesson they learned: partnering with your CRM vendor or a consultant can be crucial to the success of your data quality project. Taking advantage of their experience and expertise can save you time and headaches, Henderson advises.

Henderson also recommends that your most senior professionals, the ones most likely to have the most contacts, be rolled out first. Henderson personally worked with one senior attorney to clean his contacts, using a customized Outlook list view. It took the attorney only about 20 minutes to get through the A's, and he finished his entire list within a few days.

After this, when any new lawyer raised concerns, there was a credible role model.

Henderson also emphasized planning and communication. He spent 60 days before the rollout going on a "road show" to offices to build consensus (and momentum) for the project. He talked to attorneys and support staff about the up-front time requirements -- and the long-term rewards and benefits for them and the firm. The project was completed in December 2007.

BIG BANG

Sam Shipley, CIO at Ulmer & Berne, says his firm chose a "big bang" approach to data cleaning.

Rather than subject professionals to a year or more of periodic, ongoing data changes, in November 2007 they outsourced the process to Berkeley Datalyser Ltd., a San Francisco Bay Area company owned by Bob Lynch. (It does not have a Web site.)

BDL's system cleaned up and de-duplicated exported data using a series of rules. After change reports were reviewed, adjustments could be made and the rules revised as necessary.

RELATED ITEMS

- Can Clio Help Serve Your Practice?

MOST POPULAR HEADLINES

1. Step 4 for Legal Holds: Implementation
2. Copyright Protection on Social Networking Sites
3. Step 5 for Legal Holds: Enforcement
4. Step 6 for Legal Holds: Modification
5. Step 7 for Legal Holds: Monitor and Remove

MORE HEADLINES

E-Discovery

- Step 6 for Legal Holds: Modification

Office Gear

- Opposites Attract

Networking & Storage

- Open Source Routers Are Worth Considering

The entire process took about 12 weeks and reduced more than 200,000 contacts to about 113,000 -- almost a 44 percent reduction. As a result, the firm now can more effectively execute its mailings, says Shipley.

The cost for Datalyser is based on firm size. For firms with fewer than 100 CRM licenses (seats), the price is $7,500 for setup and data collection, plus $100 per CRM seat. For firms with more than 100 licenses, the price is $15,000, plus $25 per seat.

While this may seem expensive, it should be compared to the cost of manual data cleaning. For example, a firm with 100 users may easily have more than 50,000 contacts. With a competent data steward resolving 40 contacts per hour, a data cleaning project of this magnitude could take more than 1,500 hours -- or eight months. Assuming a rate of $20 per hour, the cleanup could cost $30,000-plus.

Shipley advises that up-front communication with users is crucial. He recommends always investigating the ways your firm's personnel actually use their contact records, some of which may not be apparent. During the process, he discovered that all kinds of irrelevant, and even private, data was stored in contact records, such as credit card numbers, passwords and account personal identification numbers. Including this data in the merge process caused some inappropriate merges on shared contacts. As a result, the firm had to spend significant time and resources to manually validate changes and create a secure custom application to house the private data.

Shipley also cautions that firms must understand from the outset that data cleanup will be a big project and be aware of the implications of failing to properly prepare. Remember that you sell the CRM project based on user benefits, so if you mess up attorney data, your project may be over before it starts.

You must also take your firm's culture into consideration before choosing a data cleaning methodology, says Shipley. Some firms will balk at spending attorney or secretary time to clean contacts before the rollout. Others may be willing to do a time consuming manual cleanup to avoid paying thousands of dollars up-front.

AN ELABORATE PROCESS

The most elaborate and technical method was employed by Baird Holm, which used multiple types of software as well as manual processes to clean and de-duplicate its data.

The first step, says IT director Robert Barker, involved exporting contact data from ContactEase and into a tool called **matchIT** from helpIT systems. MatchIT, which retails for $12,000 for an annual license, fixes contact addresses by comparing them against a U.S. Postal Service database.

For example, if one user entered an address as "St." and others entered it as "Street," the software corrects all entries to the USPS preferred style. This is important because even slight variations in addresses can create duplicate contact records -- and the problem can be amplified when you bring data into the CRM from various firm systems.

Next the firm created a "red-line" report to evaluate changes and ran a second process with a $50 application called **Contacts Scrubber** from TeamScope, which helped combine the duplicates.

During the process, Baird Holm maintained a backup copy of the original database in case there were any issues during data conversion. As a result of the cleanup efforts, the firm reduced its contacts from 100,000 to 80,000.

The project was not without challenges, however. The data quality process was slow and had a steep learning curve for new users. In addition, though data cleaning began in February 2008, it is still ongoing, and the CRM still hasn't been fully rolled out.

Management support was essential to keeping the project on track, Barker says. His advice to anyone dealing with a data quality project: having the buy-in of firm management is imperative.

Perhaps the biggest lesson to be learned from all three approaches is that there is no single -- or easy -- approach to data quality. But if a firm is willing to commit the time and resources, evaluate the options and plan a strategy, success is achievable.

Chris Fritsch *is the president of ClientsFirst Consulting in Atlanta.*