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Use Your Law Firm's CRM To Improve Client Experience and Grow Business

by JD Supra Perspectives

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[*The ninth in a series of 12 year-end posts published by LMA's Social & Digital Media SIG:*]

From the series editors: *If you, dear reader, have been following along with our series, you'll know that several of our earlier experts touched on how you can turbocharge your business growth by harnessing data from client engagement. But where exactly do you store the data? How can you make it instantly useful to as many as possible? Read on!*

Law firms are evolving and becoming more business savvy. While they may always trail their "non-legal" counterparts - and while to those inside the legal industry, the pace of this evolution may seem glacial – at least it is happening. One area where progress is being made and will continue to improve is in connecting the points of digital contact a firm makes with a client and harnessing the resulting information derived from those interactions. The challenge is: what do we do with it?

Outside of legal, we watch companies like Amazon, Disney and Harrah's collect and analyze data until they know more about your habits, preferences and life than your best friends. Who has not been disturbed (perhaps even enviously) when a link to that pair of shoes you checked out last week then seems to pop up everywhere you look on the web. As consumers, we have learned to accept this as part of using the online world.

This approach harnesses the power of CRM and big data. Collecting the crumbs every time a mouse or mobile device clicks and piecing together data about the user to match to a persona and remind the person of every product and service ogled in the last several weeks. But would a General Counsel be as understanding if your logo popped up with your attorney's smiling face and bio they scanned last week when they are reading GC Weekly online?

So, here is Big Law Firm with a Big Time CRM system collecting all types of data in all kinds of places. Firms have become far more diligent and skilled at collecting measuring and storing these crumbs and "touch points"; How many website visitors? What was clicked? How long did they stay? Email opened? Link clicked? Event registration completed? Chicken or Fish? In some firms, a next level is maybe we combine that with latest news, staff changes at the company, stock reports, financials and maps of relationships we have with the company. Plenty of "data" all stored in CRM, but what to do with it when in-your-face marketing is not an option? Here is this big beautiful CRM system with the ability to collect mega touch points, but hindered by the norms of our industry.

To find out what firms are thinking on this issue I spoke to my friend **Jeff Cordle, Senior Marketing Technology Manager at Alston & Bird** in Atlanta.

Jeff explained, "Improving the client experience is high on our list and on the radar of every firm. With some of our technologies, we have the ability to know details of who visits us digitally and what they looked at, opened and signed up for. We can potentially add other digital content about the person and company that creates a great internal profile. But moving them along the client experience curve and starting to 'digitally suggest,' with a level of elegance and grace, what else they might look at or open is a real challenge. We are looking at this carefully, but privacy is the number one thing we must maintain."

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Jeff continued, "We are looking with great interest at the concept of 'scoring' these digital profiles and storing them in our CRM system. By scoring, think of it as each time we have an interaction, the visitor gets points. Maybe 10 points for a website visit and more points as they click on various content. Maybe 25 points if they sign up for an event or blog. We could then match the visitor as a client or prospect, track spend if they are an existing client for more points and keep notes for inactive or past clients. Our ultimate goal is to have a profile of not only who a top client is, but what a top client looks for when visiting. Then, rather than overtly suggest content, we could ideally redesign our content and flow to meet the traffic pattern of the visitor and improve the next experience or the experience of the next similar persona."

As Jeff commented, improving the client experience has become imperative these days and is on the strategic plan of almost every firm. A strong CRM system can help a firm get there in a connected and personalized fashion for the client while helping the law firm increase business. Your firm could be on this path as well.

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