

# Breathing New Life Into Your CRM

INFO 3



# Panel Introduction

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# Defining Goals & Measuring Success

- ◆ Why do it? What do you want to accomplish?
  - ◆ Short-term, mid-range and long-term
- ◆ How do you define it?
- ◆ How do you measure it?

# Conventional Uses

## Marketing / Business Development

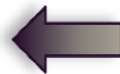
- ◆ List Management
  - ◆ Compliance, Privacy, Subscription Preferences, Opt-In/Out
- ◆ Email Marketing
- ◆ Event Management

# Unconventional Uses Tracking Business Development

- ◆ Event Automation
- ◆ Dashboard for tracking activities
- ◆ Referral tracking
- ◆ Expense tracking
- ◆ Client Teams
- ◆ Pipeline
- ◆ Competitive Intelligence

# Event Automation

1. Event list



CRM

6. Bulk import  
back into CRM



2. Invitations sent through  
3<sup>rd</sup> party mailing service

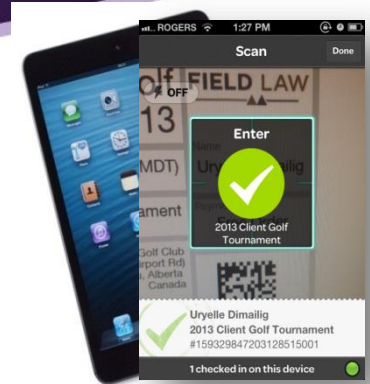


3. Registrations captured  
through 3<sup>rd</sup> party event service



4. Contacts print their  
own bar-coded ticket

5. iPads with Entry  
Manager app scan  
tickets and update  
attendance statistics



Annual Client Golf Tournament 2013  
FIELD LAW  
Field Law  
Thursday, 6 June 2013 at 11:30 AM (MDT)  
Nisku, Alberta

Ticket information

TYPE	END	QUANTITY
2013 Client Golf Tournament	17 May 2013	Free

Register

Event Details

Monopolize the golf course for a day!

Eventbrite

Please print and bring this ticket with you.

Event	Annual Client Golf Tournament 2013	FIELD LAW
Date + Time	Thursday, 6 June 2013 at 11:30 AM (MDT)	Name Uryelle Dimailig
Type	2013 Client Golf Tournament	Payment Status Free Order
Location	Redball Landing Golf Club Highway 2 (West of Airport Rd) Nisku, Alberta Canada	QR Code
Order Info	Order #159329847. Ordered by Uryelle Dimailig on 8 April 2013 12:11 PM	

Please bring your printed or digital ticket(s) to the event for admittance.

159329847203128515001



# Dashboard

[View / Edit Your Preferences](#)

\* Data last updated on 9 Nov 1 2013 1:35 pm EST

**Your Saved Searches**

[Export](#)

Activity Date	Company Name	Contacts	Activity Type	Practice Groups	Initiative	Office Location	View	Edit
							<a href="#">View</a>	<a href="#">Edit</a>
							<a href="#">View</a>	<a href="#">Edit</a>
							<a href="#">View</a>	<a href="#">Edit</a>

 Show: 
[1](#) [2](#) [3](#) [4](#) >

**Incomplete Activities**
[Export](#)

Activity Date	Company Name	Contacts	Activity Type	Practice Groups	Initiative	Office Location	View	Edit
							<a href="#">View</a>	<a href="#">Edit</a>
							<a href="#">View</a>	<a href="#">Edit</a>
							<a href="#">View</a>	<a href="#">Edit</a>

 Show: 
[1](#) [2](#) [3](#) [4](#) >

**Preferred Activities**
[Export](#)

Activity Date	Company Name	Contacts	Activity Type	Practice Groups	Initiative	Office Location	View	Edit
							<a href="#">View</a>	<a href="#">Edit</a>
							<a href="#">View</a>	<a href="#">Edit</a>
							<a href="#">View</a>	<a href="#">Edit</a>

 Show: 
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**Activities Added in the last 7 days**
[Export](#)

Activity Date	Company Name	Contacts	Activity Type	Practice Groups	Initiative	Office Location	View	Edit
							<a href="#">View</a>	<a href="#">Edit</a>
							<a href="#">View</a>	<a href="#">Edit</a>
							<a href="#">View</a>	<a href="#">Edit</a>

 Show: 
[1](#) [2](#) [3](#) [4](#) >

# Unconventional Uses

- ◆ Records Management
  - ◆ Retention / Aging / Tracking
- ◆ Communications
- ◆ Media Interface
- ◆ Private Clients: Equity / Trust / Wealth Management



# Biggest Hurdles

- ◆ Hesitance to share data
- ◆ Fear of exposing private contacts
- ◆ Technology resistance
- ◆ ‘Don’t touch my client!’

# Success Factors

- ◆ Clear Benefits
- ◆ Realistic Expectations
- ◆ Leadership and Management Support
- ◆ Communication and Training
- ◆ Data Quality
- ◆ Resource Allocation
- ◆ Build support - One person at a time
- ◆ Departmental partnerships (Marketing and IT play nicely)

# Unexpected Challenges

- ◆ What were the unanticipated issues
- ◆ Ways to overcome issues
- ◆ What didn't work
- ◆ What DID?

# What is ROI for CRM?

- ◆ How do you know you achieved your goal?
  - ◆ Metrics
  - ◆ Client Retention
  - ◆ Increased Revenue
  - ◆ New Client Representations
  - ◆ Reduction of redundant tasks
  - ◆ Lateral Recruiting
  - ◆ Enhanced Business Reporting

# Questions