

Financial Data and CRM4Legal

A Perfect Combination for
Business Development



Legal Marketing Then...

- ◆ The role and responsibilities of legal marketers has changed dramatically in the last 15-20 years



Legal Marketing Now...

- ◆ Marketing professionals are now integral to the business of law, and have a seat at the table



A CRM System...

- ◆ Implementing a legal CRM was often the first step in that evolution



Is Only Half the Equation...

- ◆ But contact data alone cannot provide enough information to effectively build these proactive and targeted marketing and business development initiatives



CRM4Legal and Expert, Better Together

- ◆ Aderant will be introducing out-of-the-box integration between CRM4Legal and Aderant Expert to enable firms to maximize their investment in CRM

 CRM4Legal Expert

How to Use Financial Data in CRM4Legal

- ◆ Financial data in CRM is meant to help the business development and marketing groups in their targeting, list creation, cross-selling and trend monitoring.

Recognize and Prioritize Top Clients

- ◆ Top client programs can be formal or informal, but either way it is important to ensure that top clients are top of mind when it comes to all marketing initiatives

Build a Better Mailing List

- ◆ Marketing communications and events are means to attract new clients to your firm, but they are also central tools in your client service arsenal

Cross-sell Services

- ◆ Large law firms with a full spectrum of practices are ideal candidates for robust cross-selling initiatives, however large law firms can also suffer from “silo” behavior, where these opportunities go untapped

Identify Trends

- ◆ While the finance team and responsible lawyers keep a close eye on client billings, AR and the overall relationships, the business development team needs a way to identify overall trends in the industry and within their firm

Demo

Thanks!

