Gain a Clear View: Track and Report on Your Business Development Efforts

Alexandra Sevilla
Marketing and Business Development Manager
Blank Rome LLP

Raquel Holder
Marketing Coordinator
Bryan Cave LLP

Jessamy Field
Client Relationship Manager
Howard Rice Nemerovski Canady Falk & Rabkin PC
Agenda

- Using InterAction Data to Communicate Metrics
- Where does the data come from?
- Presenting the data
Alexandra Sevilla
Blank Rome’s CRM Environment

CURRENT ENVIRONMENT

- 9 offices, 2 business entities
- Marketing team of 25
- 1310 users, 508 attorneys
- Firm policy requires use of IA by all attorneys and staff.

InterAction v. 5.5 GA

- Universal deployment of Web Client, only Marketing team uses the Windows Client
- All users synchronized
- Active use of “test environment to implement upgrades, modules, application collaboration.

Modules

- Opportunities
- Matters (in development)

Integrated Applications

- ContactNet (ERM)
- Tikit E-Marketing Suite
- West Monroe ClearSight Dashboard (in development)

Application Collaboration

- Accounting – Elite
- Human Resources – iVantage
A word about the Opportunities module

- Track research, proposals, pitches, and RFPs through the Opportunities module.
- New business efforts are moved through four stages:
  - **Researching** ➤ **Qualifying** ➤ **Developing** ➤ **Closing**
- Forecasting tools report on our success and workflow.
- Only Marketing and Business Development professionals enter data in the Opportunities module.
**Opportunity**

**Summary**

<table>
<thead>
<tr>
<th>Initiating Attorney</th>
<th>Office of Initiating Attorney</th>
<th>Project Manager</th>
<th>Project Manager Team</th>
<th>Project Manager Status</th>
<th>Project Manager Date</th>
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<tbody>
<tr>
<td>Peter A. Payser Jr.</td>
<td>Washington</td>
<td>No</td>
<td>Diversity Team:</td>
<td>Open</td>
<td>7/1/2008</td>
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**Descriptions**

**Opportunity Description**

JM Zell Partners is a real estate consulting firm with key disciplines including finance, construction, land planning, legal consulting, architecture, interior design, site planning, relocation services, project management, and marketing and communications.

**Research/Needs**

Full corporate research book including lobbying reports and list of proposed federal and state (NY, PA, NJ, NY) legislation. Due on July 15.

**Opportunity Details**

**Essential Facts**

<table>
<thead>
<tr>
<th>Initiating Attorney</th>
<th>Initiating Attorney Practice Group</th>
<th>Additional Practice Group (of service)</th>
<th>Bank Name Entity</th>
<th>Bank Name Entity Status</th>
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<tbody>
<tr>
<td>Peter A. Payser Jr.</td>
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**Forecast**

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<tr>
<th>Stage</th>
<th>Open Date</th>
<th>Close Date</th>
<th>Business Expectation Date</th>
<th>Probability</th>
<th>Deal Size</th>
<th>Est. Close Date</th>
<th>Forecast Updated</th>
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<td></td>
<td>7/12/2008</td>
<td>3/12/2008</td>
<td>1/12/2008</td>
<td>%</td>
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**Other**

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<tr>
<th>Opportunity Source</th>
<th>Existing Relationship</th>
<th>Reference</th>
<th>Research Provided</th>
<th>Research Due Date</th>
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**Government Relations**

**Government Relations Practice Code:** General (State)

**Related Opportunities**

<table>
<thead>
<tr>
<th>Name</th>
<th>Prospect / Client</th>
<th>Primary Service Pitched</th>
<th>Initiating Attorney</th>
<th>Date Opened</th>
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**Contacts**

<table>
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<tr>
<th>Name</th>
<th>Company</th>
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<tr>
<td></td>
<td>Black Rome Government Relations LLC</td>
<td>Opportunity Team</td>
<td>(202) 772-8582</td>
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<tr>
<td>Bryan Cave LLP</td>
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<td>Competitor</td>
<td>(913) 338-7700</td>
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<td>Holman, Mark A.</td>
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<td>J M Zell Partners, Ltd.</td>
<td>J M Zell Partners, Ltd.</td>
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<td>(202) 652-8722</td>
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<td>Initiating Attorney</td>
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<td>Sevilla, Alexandra</td>
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<td>Project Manager, Referred By</td>
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**Activities**

**Recent Activities (Last 90 Days)**

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<th>Date</th>
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<th>Summary</th>
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**Appointments**

**All Appointments**

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Communicating with the Firm

- Communicating within the Marketing and Business Development team
- Communicating with individual attorneys and practice group leaders
- Communicating with Firm leadership
Communicating with Marketing and Business Development Team

- Circulate screen shots
- Research needs/instructions
- Feedback on history and relationships with prospects
- Weekly meeting to discuss what is active
Communicating with Individual Attorneys

When meeting with attorneys on...

- a new prospect
  - client or opportunity overview
  - key relationships
  - history of any marketing mailings, newsletters

- personal business plans
  - 6- or 12-month BD overview
  - Top 500 / Top Industry Clients
  - Contacts on event and newsletter mailing lists

Global Perspective
InterAction Peer Group

2008
## Opportunity List

<table>
<thead>
<tr>
<th>Prospect/Client Name</th>
<th>Description</th>
<th>Service(s) Pitched</th>
<th>Primary Practice Group of Initiating Attorney</th>
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<th>Open Date</th>
<th>Stage</th>
<th>Outcome</th>
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<td>Government Relations</td>
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<td>8-Nov-07</td>
<td>Closing</td>
<td>Won</td>
<td>Alexandra Sevilla</td>
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<td>Jennifer C. Cotcelli</td>
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<td>Qualifying</td>
<td></td>
<td>Alexandra Sevilla</td>
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</table>
Communicating with Practice Group Leaders

- Meet with Practice Group leaders bi-weekly:
  - current opportunities in the pipeline
  - review status of “old” opportunities

- On a quarterly basis
  - provide a “state-of-the-practice group”:
    - Forecast
    - Win-Loss report
    - Year-to-Year comparison
## Win Loss Report

<table>
<thead>
<tr>
<th>Prospect/Client</th>
<th>Won/Lost in Stage</th>
<th>Est Fees</th>
<th>Open Date</th>
<th>Close Date</th>
<th>Managed By</th>
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<tr>
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<td>2/22/2008</td>
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<td>3/18/2008</td>
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<td>3/10/2008</td>
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**Won (4)** 480,000.00

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<th>Prospect/Client</th>
<th>Won/Lost in Stage</th>
<th>Est Fees</th>
<th>Open Date</th>
<th>Close Date</th>
<th>Managed By</th>
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<tr>
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<td>Closing</td>
<td>180,000.00</td>
<td>7/11/2007</td>
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<td>Alaska Native Corporation</td>
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<td>3/11/2008</td>
<td>J. Caleb Boggs III</td>
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**Lost (4)** 310,000.00
Communicating with Firm Leadership

- Monthly meeting where partners discuss
  - current business development activities and prospects
  - identify potential cross marketing opportunities.

- Firm leadership receives a comprehensive, quarterly report on the status of all business development activities including
  - new matters as a result of Marketing and Business Development efforts
  - current cross-marketing initiatives
  - industry group related efforts.
Tips to Remember

- Improve internal communication flow across the marketing and business development team, practice groups, offices, and leadership

- Identify cross-marketing opportunities

- Ensure we aren’t pitching one prospect from two sides of the organization

- Able to better qualify new business opportunities and facilitate go/no-go decisions

- Track and report successes as a result of Marketing and Business Development team’s participation
Raquel Holder
CRM Environment/s

**CURRENT ENVIRONMENT**
*Bryan Cave LLP*
- 17 Offices
- Limited Users
- 850 Attorneys
- Marketing Team of 25
- **InterAction version 5.1SP2**
  - Limited Users in Marketing Use
  - Windows Client – No Synchronization
  - Limited Deployment of Web Client

**FORMER ENVIRONMENT**
*Snell & Wilmer LLP*
- 6 Offices
- 1000 Users
- 450 Attorneys
- Marketing Team of 10
- **InterAction version 5.1SP2**
  - Upgraded From 4.5 in 2004
  - All Users Synchronized
  - Web Client Deployed

**Modules**
- None

**Application Collaboration**
- None
Tracking Data

- Activities
- Additional Fields
- Relationships
Any detailed document provided to a client or potential client at their request including outlines of strategies, fees, etc.
Proposals (RFP Responses)

ACTIVITIES
- RFP received
- RFP submitted
- RFP granted
- RFP denied

ADDITIONAL FIELDS
- Client Information Folder
- Date submitted (date)
- Requesting attorney (text or InterAction user)
- Details (text)
- Pending (yes/no)
- Resulted in Work (yes/no)
A document prepared at the request of an attorney as an informational piece for a client or potential client including lawyer bios, practice information, etc.
Pitches

ACTIVITIES

- Pitch submitted
- Pitch granted
- Pitch denied

ADDITIONAL FIELDS

Client Information Folder

- Date submitted (date)
- Requesting attorney (text or InterAction user)
- Details (text)
- Pending (yes/no)
- Resulted in Work (yes/no)
Marketing Research

Research of any company for the purpose of learning more about that company, its corporate structure, executives, etc.
Marketing Research

ACTIVITIES

Market Research

ADDITIONAL FIELDS

Company Information Folder

- Date submitted (date)
- Requesting attorney (text or InterAction user)
- Details (text)
- Follow-Up Pending (yes/no)
- Resulted in Work (yes/no)
ACTIVITIES

Purpose:

To track outings in which attorneys were participating with clients and/or prospects and requesting reimbursement

- Business Development Meal
- Business Development Outing
A collection of client names which the firm has permission to use for marketing purposes.
Representative Clients

**ADDITIONAL FIELD**

*Client Information Folder*

- Permission to Publish (yes/no)
- Added to the client search profile in the web client
- All personnel could search for this information
Organization Involvement

RELATIONSHIP

- Between attorney record and organization record
  - Member of…
  - Board member of…
  - Director of…
- Available to all users in the web client
Marketing Distributions

ACTIVITIES

- Invitation
- Announcement
- Newsletter

Summary included the name and date of the mailing or event and the manner in which the mailing was sent, either via post or email.

Important! Summary text must be uniform for all activity entries.
Event RSVPs & Attendance

**ADDITIONAL FIELD**

*Marketing List*
- RSVP (drop down list with yes, no, cancelled)
- Added prior to the event and deleted after the event

**ACTIVITIES**
- Attended
- Did Not Attend
- Added following the event and kept indefinitely
ACTIVITIES

Newsletter Request

Summary included the newsletter to which the contact asked to be added
Tips to Remember

- Customize
- Standardize
- Extract
Jessamy Field
CRM Environment/s

CURRENT ENVIRONMENT
(Howard Rice)
- 1 Office
- 300 users (120 attorneys)
- Marketing team of 6
- InterAction version 5.6
  - Installed in 1999
  - 4.5 to 5.5 to 5.6 upgrade in 2008
  - All users synchronized with web client
- Additional Modules
  - Matters Module (in development)
  - Application Collaboration
  - Email Marketing – Concep

FORMER ENVIRONMENT
(Clayton Utz)
- 6 Offices
- 1,900 users (900 attorneys)
- Marketing team of 45
- InterAction version 4.5
  - 5.5 upgrade in 2006
  - All users synchronized
- Additional Modules
  - Email Marketing – custom program
- Other Applications
  - Time & Billing – CMS

Other Applications
- Time & Billing – CMS
- Personnel - Spectrum

InterAction Peer Group
Management Reporting
Quarterly Management Report

- Graphing in Excel
- Data based on custom searches from InterAction
- Final format is in Word

Content:
- Pitches & Proposals
- Media/Publicity
- Email Campaign
- Events etc
- System – usage and data integrity stats.
## InterAction User Contact Lists Analysis

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<tr>
<th>Account</th>
<th>User Name</th>
<th>First Populated</th>
<th>Firm</th>
<th>Personal</th>
<th>Private</th>
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<td>MEALL</td>
<td>Bell, Maryanna</td>
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<td>37</td>
<td>25</td>
<td>17</td>
<td>3</td>
<td>82</td>
<td>4</td>
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<td>12-Aug-2006</td>
<td>760</td>
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<td>12</td>
<td>233</td>
<td>1,216</td>
<td>10</td>
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<td>101</td>
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<td>David, Larry</td>
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Email Marketing Campaign Results

Campaign: Client Alert: Stonebridge Decision Confirmed as Good News For Law Firms
Sent: 14 May 2006 11:49PM
Authors: Mark A. Sheft, Sean M. Sablewski
Distributed by: Securities Litigation, Professional Responsibility, Receivables

Top Readers (Alert viewed more than 4 times)

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Undelivered Alerts

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<td>Shavon</td>
<td>Rauseran</td>
<td><a href="mailto:srauseran@tnsn.net">srauseran@tnsn.net</a></td>
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What does this mean?

A unique view rate of 32% is greater than the average view rate for Client Alerts (20%). The delivery rate of 94% is greater than the former average of 84%.

Suggested actions to further improve unique view (readership) rate:

1. Nullifying list renewal: Are the groups keeping contacts on the list? Each attorney should review their contacts and ensure relevant contacts are added to the distribution list.

2. Write with the client in mind: Write in style that is client focused, straightforward and concise. The implications for the client should be at the beginning of the content. Use lay language that is dynamic and

Report Format:
Email, generated in MSWord with hyperlinks to IA activity reports
### Activity

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<th>Regarding</th>
<th>Activity Type</th>
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### Contacts

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<td>Abernethy, Steve</td>
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<td>Alton, Greg M. Esq.</td>
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### Properties

- **InterAction Result**
- **Protocol**: HyperText Transfer Protocol
- **Type**: Not Available
- **Connection**: Not Encrypted
- **Size**: Not Available
- **Created**: Not Available
- **Modified**: Not Available

**Note:** The properties dialog box is not fully visible in the image.
### Select contacts to add to this list

**AOL: Real Estate/Land Use & Environment**

Contacts in your list only must be added to the Firm List prior to being added to this list. When you select contacts who are already on the list, you will be added as a sponsor.

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### Area of Law Mailings Lists

- **Antitrust & Trade Regulation**
- **Hedge Fund Developments/Investment Management**
- **Professional Responsibility**
- **Appellate**
- **Intellectual Property**
- **Real Estate**
- **Bankruptcy & Reorganization**
- **Labor & Employment**
- **Securities Litigation**
- **Corporate & Finance**
- **Mergers & Acquisitions**
- **Tax Strategies & Planning**
- **Emerging Companies & Venture Capital**
- **Private Client Services**
- **Executive Compensation & Employee Benefits**
- **Private Equity**
Attorney Business Development and Marketing report (modified out of the box activities report).

Based on all Marketing and BD designated activities that are connected to individual attorneys
Tips to Remember

- The **purpose** of marketing measurement and reporting is to enable the firm to take smarter risks to achieve growth and attain competitive advantage.

- Reporting is **motivated** by a desire to be more aggressive, efficient and effective with the marketing budget.

- Check your motivation before you launch and make sure you're being honest about the desired outcome.
Conclusion

- Communicate to the firm what your efforts have been and how it has helped grow the firm
- Track marketing and business development efforts by customizing additional fields and activities
- Build reports that extract the information you have tracked
Questions?

Alexandra Sevilla
sevilla@blankrome.com

Raquel Holder
raquel_holder@bryancave.com

Jessamy Field
jfield@howardrice.com