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CONTACT MANAGEMENT

Long Time Coming

The road to CRM takes years, not months.

By Tina Love & Werner Gehrke

ANY successful installation of client relationship management software is a multi-year project, not a quick fix. That certainly was the case at Walnut Creek, Calif.-based Archer Norris, a 57-attorney, 128-person litigation and transactions practice.

In 2001, we decided to establish a firm-wide contact management database. At that time, our client and contact information existed in all the usual places: Outlook Contacts, Word address lists, an outdated Access database, and in Rolodexes. Today, we continue to grow and develop the program, to increasing acceptance among our attorneys and staff.

REVIEW COMMITTEE

We started by establishing a review committee, with representatives from our marketing, I.T., and management staff, and several attorneys. We evaluated several products, including Interface Software Inc.'s InterAction; Elite Information System's Apex, and Aptus, from Scout Solutions. After extensive review and consideration, we chose ContactEase from San Francisco-based Cole Valley Software.

Up front, the advantages of ContactEase were many, but how it integrated with Microsoft Corp.'s Outlook was key. Like many small firms, our marketing and I.T. functions are performed by a skeleton crew. We needed software that was intuitive and familiar, did not require extensive training, and was relatively easy to install.

ContactEase has two options for desktop licensing: Outlook synchronization, and the full client application. Outlook synchronization gives users the ability to look up, add, and edit data through Outlook contacts.

After some brief delays and postponements when other projects took over the front burner, we purchased five full-client licenses in 2002, with the balance of users linking through Outlook via the synchronization licensing.

We then launched an internal PR campaign trumpeting the coming of the great contact data system. Our marketing and I.T. staff worked with Cole Valley Software to plan a tiered roll out.

First, we spoke to all attorneys about how they stored data, their level of expertise in Outlook, and the number of contacts we could expect to import. The personal ownership aspect of an individual's contacts was handled as diplomatically as possible to highlight the benefit of sharing information:

• Everyone would have the most current information about shared clients and their interaction with other users in the firm.

• Support staff could access data through Word to create mailing lists.

• Contacts can be tracked by the record's originator, so they can be sorted and reported. The originating user maintains ownership over the contact, and has the option of marking contacts as "private" to prevent sharing.

We then met with our accounting department staff to discuss inclusion of their Elite Information Systems data. However, the records differed in so many basic ways that we decided against synchronizing billing contacts with business development contacts. Armed with current usage information, we planned the necessary customization of categories, data field mapping, screen elements of the full interface, and user security levels. We were ready to begin the server installation.

At this stage, we ran into a problem with user authentication to the ContactEase SQL database. Pass-through authentication from NT to SQL was not working. We worked with Cole Valley support to develop an ODBC add-on to pass SQL authentication through to allow proper application functionality.

This was fixed via modifications to the setup.inf file. Once that was verified, Cole Valley created a new install.exe with the various changes in it. This then allowed for the installation to proceed properly.

We then selected our environmental industry service group as our pilot for the trial run. We picked it because its five members were tech-savvy power users who were sure to offer immediate, constructive feedback. The initial data synchronization and user feedback established the correct field mapping between Outlook and ContactEase with minor adjust-

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ments, causing a day or two delay.

Installation halted yet again when our I.T. team members were pulled from the project for two months to move one of our offices and set up a new location.

In the meantime, we experimented with the sync for Palm and BlackBerry PDA users, and found the compatibility quite acceptable.

We completed the rollout to the rest of the attorneys group by group, at about two-week intervals. A few months later, when the firm upgraded its Outlook software, the remaining staff members were connected to ContactEase through Outlook synchronization.

At intervals between the rollout groups, our marketing staff worked with the software to "scrub" the newly acquired data. Anyone who has ever looked at someone else's contact records can imagine the great variety of forms this data represents.

We were well aware that the amount of cleanup required would take us several months, because we could only devote one person, part-time, to the effort.

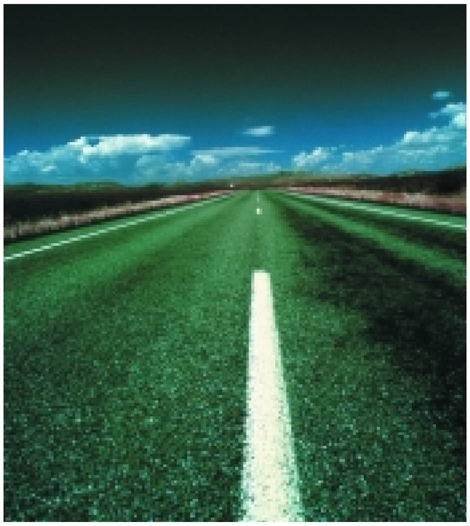
After diligent line-by-line work and more memos to users about standardizing data entry, our database was beginning to shape up.

Categorization was our next step, and is ongoing. As you may imagine, it is impossible to intuit categories. "Sam Smith, President of Smith International" could just as easily be an attorney, an accountant, or an Audi salesman.

Because we did not include our billing system in the synchronization, we needed a source for new, very dependable data. We solved both problems by finding a liaison. The firm's receptionist was trained as a data steward. She is included in the e-mail distribution lists for new client, new case and case maintenance forms, and is the primary input source for fresh data.

New records are automatically assigned the category "unreviewed" so they can be discovered with a simple search. Every day, new records are categorized, merged with duplicates, or cleaned up if they have been altered beyond recognition. When questions or conflicts arise, the receptionist talks with those who generate the records, and even calls clients to verify addresses and phone numbers. We estimate that she spends about an hour per day on this data review.

Less than four months after the installation, we sent our first mass e-mail communication. It was actually startling in its simplicity. We decided to create a dummy user called "info@archernorris.com" to send general messages. In ContactEase's full interface, the recipients had been categorized and were easy to locate in a simple find. After selecting a test group, it was just a matter of "file ->send" to open an e-mail window (in our existing application) that was populated with the selected e-mail addresses. All that was left was to compose the message and send. Instantly, 300 people heard about the new legislation effecting litigation.



"Our first mass e-mail communication was actually startling in its simplicity."

Once the message had been transmitted, we selected the entire group again to add a notation that they had received the e-mail. Beginning that afternoon, calls and e-mails came in from recipients with positive feedback and requests for more information about the legislation. Bull's eye.

The following month we used the database to send an electronic invitation for an upcoming seminar. The electronic invitation was duplicated with a hard copy mailing a few days later. To gauge the effectiveness of both methods, one asked for RSVP by e-mail, and one by phone. Responses via e-mail were received more than 4:1 over telephone RSVPs. We have since created personalized e-mail from ContactEase, in combination with Word's mail merge capabilities and Outlook integration.

We've made use of the database's capability to generate and track activities. Invitations and registration/attendance confirmation are noted in each contact record. This way, when an attorney opens the contact record to place a call to his or her client they can see if there is an invitation pending, or if the client recently attended a meeting.

To prevent firm-wide publication of personal information, attorneys and staff need regular reminders that their records are drawn into the public folder. A few months after our installation had settled in, we published the database to a public folder in Outlook. The result is a comprehensive phone/e-mail/address book, complete with notations on recent contact or relationships with the individual. The records can be accessed through Word to place into letters, labels and other documents. They can also be drawn into a private Outlook folder and automatically synchronized.

Peter McGaw, a shareholder in our environmental group, was one of the first users, and remains a strong champion of the system.

"The members of my team share the same records, so we present an informed and unified impression to our clients," he says. "When a client calls, we have immediate access to notes regarding recent contacts from other attorneys in the firm.

Today, our database currently houses approximately 12,350 records. Clean up is ongoing, and will continue to be important as long as the database exists.

Ultimately, one of the strengths of the way we use the system is that the lawyers aren't doing anything differently than they did before. This is a benefit because we don't think we could have gotten many of these lawyers to use new software!