USING CRM TO IMPROVE CLIENT SERVICES

By Bret Bagley

ABOUT a month ago, one of our litigation partners, Jon Brightmire, was reading the day's appellate court rulings to keep current. Jon saw a decision that had an immediate impact for Oklahoma employers and property owners. The Oklahoma Legislature passed a law some years ago that stated that property owners, including employers, could not prohibit people from keeping guns in their locked vehicles. However, that law was quickly put on hold by a trial judge.

Now, the Tenth Circuit Court of Appeals had reversed that ruling, effective immediately. Notably, any property owner or employer who had a policy prohibiting guns on their premises, if it included areas designated for parking vehicles, would be in violation of this law until the policy were amended. Jon immediately contacted one of our employment lawyers to notify her of the ruling (she just happens to be his wife, Kristen Brightmire – as you'll see, we do everything we can to encourage cross-representation).

Kristen wrote the content for an alert, providing an analysis of the ruling and potential consequences for those companies that did not comply. The content was inserted into an e-mailing template and was sent out approximately 90 minutes after Kristen first heard about the ruling. Within 30 minutes of the mailing, Kristen had received two reply e-mails, engaging our firm to provide legal advice on compliance with the new ruling. Within two hours after a matter of importance to our clients was unearthed, we had signed two engagements. This wasn't an accident, but a result of some careful planning as part of a major strategic initiative of our firm.

Over a year ago, our management took a look at where the economy was headed and what we needed to do as a firm to prepare. Law firms are a service business. We needed to ensure that our law firm was providing value to our clients, over and above simply responding to their requests for legal counsel. We retain clients and expand those relationships in part by informing our clients of issues that may affect their business and advising them as to how we can help.

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Yet, we were mindful of the economy and our need to contain costs. It had become impractical to have our attorneys try to place telephone calls or write letters to hundreds of clients to inform them of changes such as this. Businesses need information today – not tomorrow or next week. We looked for alternatives to meet our goals, which were:

- Improving service to our current clients
- Reaching out to potential new clients
- Maximizing efficiency for both our clients and the firm
- Reducing costs
- Using an environmentally-friendly option whenever possible.

Our first focus was to deliver an even higher level of service to our clients in order to constantly reinforce the value that we provide. We felt that one way to do that would be to provide more communication, both through regular newsletters and timely, focused client alerts. In short, we needed an easy way to be sure our clients had the information they needed to run their businesses. We had to get them that information quickly and in a format which was easy for them to use.

Second, management also realized that we had clients which used our services for only one area, when we had many areas of expertise to offer. We wanted to let more clients know about our attorneys' specialty areas. Again, the challenge was to get the message out as efficiently as possible, focusing on the clients' needs and highlighting our capabilities.

Superior communication is providing high quality content that is timely, accessible, and relevant.

Finally, as the firm had recently organized into practice groups to enable those attorneys with the expertise to provide the services needed, the practice groups saw opportunities with direct and immediate communication with our clients and prospects, especially with e-mailed alerts. This would enhance our client service as well as potentially land some new clients.

In essence, we saw that superior communication would help our firm achieve its goals. In addition, we saw that we could reduce our costs and be in sync with our firm's Go Green Initiative by doing this in electronically (eliminating paper and postage costs).

Our definition of superior communication is providing high quality content that is timely, accessible, and relevant.

Timely means we get the information to our client when they need it -- today. We knew we needed efficient and quality tools to create the mailings quickly, while maintaining a professional appearance. We also need technology to manage the mailing process, especially to avoid being perceived as a spammer. Up to this point, we had been storing contact data in an Access database, but found this inadequate for managing multiple, overlapping mailing lists.

Accessible means the content is received by our clients in a format that they use and like. While undoubtedly personal communication will always be king, it is impractical in today's fast-paced climate to have a meeting or even a phone call with every client who might be impacted. Clients are busy running their businesses. They want the information as succinctly as possible. We already use e-mail for many such communications, but we did not have a system to allow us to e-mail to tens or hundreds of recipients at one time. It was slow and time-consuming to send individual e-mails.

Relevant means that it matters to the recipient. We filter our list so that the recipient is likely to be interested, perhaps because of their industry or job title, or some other characteristic about them or their company. Thus, we needed a system for categorizing and classifying our clients and potential clients so that we know what to send to whom. If we blast every mailing to everyone in our database, those not interested in irrelevant mailings will start ignoring the ones they may be interested in.

Our first step in technology was to implement ContactEase CRM, a product that is designed for mid-sized law firms. After populating it with our Access data, it then synchronized our attorneys' Outlook contacts folders, cross-referencing the data as to where it came from, updating everyone with changes, and allowing us to slice and dice it any way we like. Now, we track mailing lists using defined categories (practice group, industry, etc.) and are able to quickly and easily create lists for any purpose we may have.

We used a local graphics design firm, Cubic, to design an HTML template for us. Now, all we have to do is write the content, insert it into the template, and send it out to the proper list. We do this with regular e-newsletters as well as client alerts, such as discussed at the beginning of this article. We can also store these on our web site, making it even more accessible for our clients.

As evidenced by the story above, our process has been successful in providing timely information to our clients. This has raised the awareness of our firm and has resulted in new business. This is where Doerner Saunders has excelled. We have management's backing and directive to be the best at client communications, and we are seeing the results. Moreover, we have realized our other goals – to reduce the costs of communications while striving for environment-friendly options.

At Doerner Saunders, our plan to maximize technology has resulted in increasing client service while still saving some trees. It doesn't get much better than that.

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