Customer Relationship Management Software

Help for Attorneys in a Competitive Marketplace

By John D. Crane and Victoria Vuletich

"Modern business is pure chaos. But those who adapt will succeed."[1]

The legal profession is not immune to the profound changes occurring in the business world. To be successful, attorneys must adapt to these changes.

Clients are increasingly demanding that their attorneys demonstrate an active personal interest in their unique needs and challenges in addition to providing quality legal services. Relationship marketing has been a weapon in attorneys' arsenals for a number of years. However, the traditional way attorneys have approached client development requires adaptation to succeed in today's competitive marketplace.

One of the most efficient ways to manage attorney-client relationships is through the use of customer relationship management (CRM) software. CRM programs supplement your business development by helping you follow up on leads, stay in touch with clients, share information within your firm, and gather valuable relationship intelligence. Tracking key pieces of information about your clients can strengthen and refine your marketing efforts. Being able to quickly view your current clients through a historical lens and analyze your client base using different factors can provide new insights into your firm, practice area, and the direction in which you want to head regarding client development.

Many off-the-shelf CRM programs are cumbersome and complex. However, standalone systems that are much easier to use can be developed and customized for your particular practice at a reasonable price. Following is an example of a customized CRM database with sample information such a system might contain.

Assume you have been retained by a client who is an avid golfer at resorts in the southwest United States, runs a business focused on timber imports, and is a member of several national organizations. To add that client to your database, you would enter basic information such as name, address, city, and state, then headings for topic (golf) and additional information (southwest U.S.). You would add other information (timber industry, name and scope of active organizations, etc.) in the same manner.

The topic of golf would then be operationally defined in a master table. Adding a description such as "a hobby specifically relating to the playing of the sport of golf and travel" would be useful if you find an interesting piece of information relevant to clients with golf as a topic of interest in their profiles. For example, if you read about the opening of a new golf course in the South, you could send a handwritten note to your client that says, "[insert client's name], I saw this and thought of you. I hope all is well with you, your friends, and family." (Better if you know the names of the client's spouse and children.) Ideally, each category under each heading would be coded for easy report generation, mail merges, and recordkeeping.

It is easy to develop a keyword, client-centered system, and maintenance takes only a few minutes each week. Attorneys have traditionally seen this type of marketing effort as a distraction from the bottom line and billable hours; however, this is an organized and efficient method for maintaining relationships; increasing client trust, billable hours, and referrals; and, most importantly, strengthening the bonds of the attorney-client relationship.

This is only one of a number of tools attorneys can use to grow their client base and strengthen relationships with existing clients. For example, many legal-specific practice management software systems can fulfill the traditional CRM roles with greatly expanded functionality. For more information about customer relationship management software systems, contact a practice management advisor at the State Bar of Michigan's Practice Management Resource Center. ■

Law Practice Solutions is a regular feature brought to you by the Practice Management Resource Center (PMRC) of the State Bar of Michigan, featuring articles on practice management for lawyers and their staff. For more resources offered by the PMRC, visit our website at http://www.michbar.org/pmrc/content.cfm or call our Helpline at (800) 341-9715 to speak with JoAnn Hathaway or Diane Ebersole, Practice Management Advisors.

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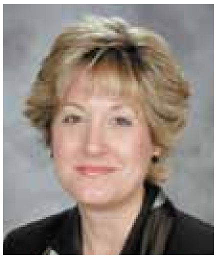

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FOOTNOTE

1. Safian, *Generation Flux*, Fast Company, February 2012, p 60.