

7 REALITIES OF CRM SUCCESS

Commentary from a panel of CRM “Futurists” at LMA New England Conference
The Future of CRM -- and the CRM of the Future
November 15, 2016

- 1. The law firm challenge: Lawyers don't feel they get enough value out of CRM compared to the investment they put in. To succeed provide value.**
- 2. Definition of law firm CRM success: Deliver value and save attorney time.**
- 3. CRM is a long-term process, not a one-time project. Because CRM is a fundamental change in how the firm manages its most important asset -- its relationships, -- it never really ends.**
- 4. Start with a needs assessment. Every firm defines CRM success differently, so you have to take each firm where you find it.**
- 5. The right CRM strategy is “crawl, walk, run.” One small move in the right direction is often the best place to start.**
- 6. “Big CRM success” is a collection of small wins. Build consensus on CRM by creating wins with key stakeholders.**
- 7. People, process and problems first, products second. True CRM success is more about the dealing with people and process issues than technology.**

Research by industry experts shows that up to 70% of CRM implementations fail to meet expectations. What the research doesn't say: The primary reason for failure is people and process issues, not technology. With more than 10 years' experience providing CRM solutions for law and professional services firms, we can help. Our **CRM^{MOMENTUM}**™ program offers real solutions to take your CRM to the next level.

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