



## Podcast Episode 10 - Law Firm CRM With Chris Fritsch

*What law firm CRM does really well: Communication, coordination, client service, and business development.*

Listen here:



or



Chris Fritsch is Founder and President of CLIENTSFirst Consulting, a strategic business development technology consulting firm that focuses on CRM, eMarketing and related technologies for leading law and other professional services firms. Chris applies her background in law and more than 15 years of legal marketing, business development and technology experience to help her clients grow and succeed. Chris is a popular speaker on CRM, eMarketing and Competitive Intelligence topics in the professional services arena.

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## Podcast Shownotes

The beauty of CRM is it can do a thousand things. The problem with CRM is it can do a thousand things.

Starting out, most firms should concentrate on only two or three things. The challenge is that those two or three things are different for each firm, groups within the firm, or attorneys.

The most important factor in determining how CRM can provide value is how the firm or group defines value.

Start with a needs assessment. Understand what you want to get out of CRM before you get the technology.

Consider people, processes, and problems first, then the product:

- Some firms just want to manage email lists and events which saves tons of time and for law firms, time is money.
- Others want to identify and leverage relationships.
- Later, you can add client team support, an alumni program, business development tracking, pipelines for opportunities, and other activity tracking.

CRM represents a fundamental change and improvement in how the firm manages its most important assets: relationships. It's not a project or initiative that just ends. It's an ongoing effort.

## A culture change

The markets are competitive, demand is flat, and clients are in the drivers seat in terms of pricing. This has propelled law firms into functioning more like a business, including CRM-enabled client service and business development. For instance, lawyers are starting to share contacts instead of viewing those contacts as their own personal property

### **What is the best way to get your attorneys to adopt CRM technology?**

- Assess your needs up front.
- Don't roll out CRM firm-wide all at once. Do it strategically by group. Find a distinct group where CRM can be a clear benefit and deploy on a micro level. Chris offers a few law firm examples of successfully implementing CRM on the podcast.
- Training and communication are essential.

## What about the quality of the law firm's data?

Thirty percent of your data degrades every year – people move, get married, change jobs, get promoted, retire, etc. If you don't keep up with the changes, within two or three years, your data will be completely degraded.

The key to CRM success is clean, complete, and correct data. The quality of your data affects the delivery of your campaigns. When bounces come back, someone needs to go through them, research them, and update them.

Chis shares the story of a firm who had 10 data stewards. They quantified the value of a relationship at over two million dollars and keep as many data stewards as needed to ensure their relationship data is as perfect as possible. You may not need 10 data stewards but it's essential that you have some distributed among the firm or hire a consultant to keep your data clean.

## What other technologies work with CRM to enhance value?

Before thinking about integrations, ask one question: Why? If there's not a compelling answer for the "why" then integration is not part of phase one of CRM adoption.

A phase one integration could be eMarketing. Perhaps time and billing software.

Start with a manageable data set, such as the top 50 or 100 clients. Bring that data over first and validate the data.

As the market has become competitive it's tremendously important for law firms to coordinate business development, and that involves tracking, pitches, RFPs, last step, next step, and so on, and have all of the historical information to be able to predict revenue, and even hiring and expansion.