



CRM – Customer Relationship Management.

What is it? One of those “must have but not brilliantly understood” concepts.

There are software products that fill the niche from standard offerings from practice management suppliers like Axxia, AIM and MSS. Also more specific software like ACT, Goldmine, Logical Planet, Sales Logix through to the dynamo Interface InterAction or even workflow and entity management like Metastorm or Axxia’s DNA. (Microsoft Office Sharepoint also have a module). Costs are from hundred’s to many thousands of pounds. All are no doubt good solutions in the right environment and firms of all sizes have reported returns on their CRM investment

However, in a survey conducted by the LSSA (Legal Software Suppliers Association) only 2% were getting all the results that they wanted, 12% beginning to get major results, 24% making progress but felt it was “early days.”

Most firms need “CRM” but their definitions of what it is are radically different. Before buying /upgrading CRM software, simple questions should have been put on the table for consideration: Who is my biggest and most profitable client (will it find them), what is our lock up by client? What are the event management requirements? (Conferences, seminars, golf days), will it handle contact management? (Mailshots and Christmas cards).

As well as thinking about these questions, the software will need to co-ordinate capture of data across the whole of the firm to provide the platform for more penetration, cross selling, client retention and new business generation.

CRM needs business and process analysis in every firm of every size. What is the strategy? Where do I stand now with clients and prospects? What do I need to move forward? (This can vary within firms by work-types and clients). Other key questions: are we culturally ready for it? Or in down-the-line implementations has the culture adapted how we expected? Are there problems to address?

You also need to consider responsibilities: will it be a marketing department tool or will heads of department and client partners input? If everyone is inputting ensure there are ways to gain consistency of approach. When this is done make sure measuring benchmarks are put against the software to check ongoing success.

Return on investment comes and increased profits come after analysis, preparation, ownership, configuration and by measuring results.

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www.lssa.co.uk/