Lawyers, Too, Can Benefit From CRM

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When the law firm that took over our company's legal advisory services two years ago asked me what Buljan&Partners did, I tried to find the right words to explain CRM to someone in daily contact with "customers"—in most cases, for extremely relevant and confidential issues to resolve.

My simple answer was to explain that we help companies be more customer-centric by improving processes and people performance, meaning implementing change and involving the whole organization into it. Surprisingly, the law firm asked me to make a presentation about CRM—and how to make it work in a Spanish-based law firm—to its board of management. So said. So done. And I still remember this challenging meeting!

Does a CRM implementation make sense for a law firm, and if so, how should it be structured to guarantee success? This was one of the crucial questions members of the firm raised, and I really had to think hard and use my practical experience to find the right way to convince a team of five senior lawyers who hadn't done anything else in life but be in contact with clients and give them legal advice.

When I talk about CRM for lawyers, I am not defining a new way of working with clients or suggesting that lawyers invest time and efforts in defining a CRM strategy and starting to segment clients. What I mean is "unifying criteria and disciplining the organization" to follow the best examples in that organization. Each senior lawyer and the subject matter experts know exactly how to treat and respond to a client, how to prepare crucial meetings with the client and how to talk about legal issues at specified conferences. But each one does it in his or her own way. The objective of CRM here is to structure some simple but effective CRM processes, define some pragmatic performance measures for their evaluation and design a client knowledge-sharing approach to make sure that client data is maintained and actualized in the supporting client database. And all this derived from a clear definition of a customer-centric culture.

Our project subsequently had four main phases and took us about six months to conduct. In a first step, we analyzed such elements as current customer interactions, main contact persons, rules for decision taking, employee involvement and IT support. In the main, we found that there was a lack of a common understanding of customer-centricity; a typical inside-out view of customer needs and expectations; and a clear "expert attitude" toward future developments. This meant that, basically, the customer was not involved at all in the definition of the service portfolio, and "cross-helping" was something very visionary for the firm. "Cross-helping" is the law firm's term for "cross-selling" in the belief that lawyers don't "sell." They help their clients in critical situations.

Pragmatic approach

In a second step, we convinced the partners to have people ask customers about expectations, needs and ideas for improvement—something absolutely revolutionary! They did it—even though, we initially focused on only 100 key clients—and were surprised at the results. Some services that the lawyers had treated as sacrosanct were, from the client's perspective, absolutely unnecessary. And services that were offered as a must—but not out of conviction—were rated top by clients. Based on the results, we defined a pragmatic CRM approach around the customer experience.

In a third step, this new methodology was implemented in the whole organization, starting with all senior and associate lawyers and ending with back-office support people with no direct and visible interaction with clients. Even those people needed to understand what customer-centricity would mean for them. Also, a person was designated to oversee office-wide CRM, responsible for the annual client contact plan; preparing prospect and client fact sheets for senior lawyers before important meetings; enhancing the client database to include an interaction history; and, last but not least, identifying possible areas of cross-helping that would create value for clients.

In a fourth step—which we are still in the middle of—the entire organization at five different locations is being trained in CRM cultural values, the meaning of customer-centricity in the daily work and a brief introduction to the law firm's CRM approach.

This is the most important phase of the project and it encompasses the "unify and discipline" aspect I referred to earlier. No matter who is involved in interacting with the client, the CRM corporate values of the law firm have to be transmitted to—and felt by—the customer to create true customer value and transmit professionalism, personalization and trust.

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