

Greenberg Glusker Revamps CRM System and Lands \$600K+ in New Business

By **Larry Bodine**, a business development advisor with a nationwide practice. He has helped 250+ law firms generate new revenue by devising strategies, conducting business development retreats and individually coaching attorneys. He can be reached at www.LarryBodine.com and 630.942.0977.



CRM is the red-headed stepchild of law firm marketing. Lawyers are by nature reluctant to share their hard-earned contacts with others. CRM is a headache for marketing departments, which have the thankless task of updating the databases. CRM rollouts have an 80% failure rate, according to CRM.com.

But impressively, a Los Angeles law firm "rebranded" its CRM system, presented it as something new and inspired widespread usage of the system by the firms lawyers and staff. "Greenberg Glusker transformed its CRM from DOA to BFF," quipped Director of Marketing Jonathan R. Fitzgarrald.

It took 12 months -- but new business linked to the initiative includes representation of investment banker in \$150M financing, with more than \$600,000 estimated in attorneys' fees. And the firm won an LMA Your Honor award to boot.

The 70-lawyer firm called it C-P-R (Clients, Prospects, Relationships) for CRM. "Our strategic objective was to identify and promote cross-selling opportunities across all practices of the firm, and increase efficiency and effectiveness of practice development efforts by leveraging a CRM application," Fitzgarrald said. "Our marketing goal was to foster a firm-wide, cross-selling culture by building trust and confidence in a CRM application."



C P R be the spark that turns
CONTACTS PROSPECTS RELATIONSHIPS toothpicks into matches.

It took an internal marketing campaign featuring posters and "desktop drops" to get skeptical lawyers and secretaries to come to training sessions. IT and marketing put their heads together to create a new user interface and navigation. The firm use real-life scenarios to train their people on creating a new company profile and creating a person profile.

- Users increased from 33 (secretaries and a few attorneys) to 168. Attorney and staff usage jumped from zero to 100 percent, secretaries' usage spiked from 20 to 100 percent.
- Data monitoring increased accuracy from 15 to 90 percent which led to 96 percent of attorneys sharing all contact information firm wide.

Greenberg Glusker is a full-service law firm with 70 lawyers with expertise in entertainment and real estate law. The firm represents clients in the agribusiness, charities & nonprofit organizations, ecommerce, energy, entertainment & media, environment, financial services, health & fitness, real estate, sports and technology industries.



Jonathan Fitzgarrald

The project was carried out in four phases:

Phase 1: C-P-R strategy and planning. Fitzgarrald created and presented the C-P-R strategy, identified and resolved technical upgrade issues and gained approval from firm management for the relaunch.

Phase 2: Internal marketing and pilot launch. Fitzgarrald created a new application name – **C-P-R** (Clients, Prospects, Relationships) that dissociated it from the old CRM and highlighted the benefits of new one.

- He devised and executed a high quality, firm-branded internal campaign.
- He established a pilot group with a dozen firm members, including attorneys and staff, whose early training situated them as evangelists when C-P-R launched.

Phase 3: Training involved extensive differentiated skills training for attorneys, secretaries and staff. Secretaries learned to update and sync contacts and attorneys learned to mine relationship data. Training was never mandatory but still achieved 100 percent compliance.

Phase 4: Audit trails and follow up. Audited usage reports allowed proactive identification of users requiring additional training. Pilot program members received advanced power user training.

A changed perception changed reality,” Fitzgarrald said. “C-P-R reemerged from a static rolodex into a trusted, user-friendly and dynamic communication tool to identify cross-selling opportunities and manage client, prospect and referral relationships.”

For information about business development training, contact:

Larry Bodine, Esq., Business Development Advisor

Tel: 630.942.0977

E-mail: Lbodine@LawMarketing.com

Web: www.LarryBodine.com

Assisting law firms for 20 years:

- Training lawyers at firm retreats.
- Coaching lawyers to develop their personal marketing plans.
- Developing business development strategies.
- Using technology to market a practice.