



CRM: Not an 'Ancient Chinese Secret'

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Confucius Says: 'The Best CRM Is Invisible to the Eye'

The wisdom of Confucius enlightens. although it usually takes a very long time to figure out the meaning of a select Confucianism, you know the wisdom is there somewhere. But it takes a lot of thinking to figure out the benefits of his wisdom. The same has been said about client-relationship management technology (CRM). CRM is the term used to describe the technology and practices related to client acquisition, management, marketing and retention. Writing down the name and address of a prospective client, and jotting down some notes about their likes and dislikes or their interests (*ie*, so they can be leveraged in an effort to win them as a client), is a common practice of CRM. So it is with any practice that helps manage interactions (e-mails, meetings, calls, or letters) with clients intended to increase books of business. There are other support components to CRM, such as marketing to clients and keeping them informed about what the firm offers. In a nutshell, that is CRM. And, while most people understand its benefits, many stay away from implementing CRM technology for very basic reasons.

A Web search on CRM usability yields a number of links — most of them point to software vendors who claim that their software increases or enhances CRM usability. Defining “usability” in this context depicts usability as the ease with which people can employ a particular tool or other human-made object in order to achieve a particular goal. The two primary components of usability — how easy it is to use and how much it enables you to achieve a particular goal — are of tremendous significance as it relates to CRM.

CRM has been the source of great successes and equally publicized failures over the past 15 years. Even when it has been successfully utilized to increase business and strengthen client relationships, organizations and law firms still go through hours of frustrating strategic and business analysis evaluating how to make the best use of CRM. Marketing departments still spend days locked in conference rooms trying to figure out how to capitalize on their firm's CRM investment through successful events, newsletters and mailings. But, with all these experiences, there has yet to be an organization or practice to have succeeded with a CRM tool that was difficult for their attorneys and staff to use.

To further clarify, note the differences between interaction design and information architecture. Interaction design controls the immediate user experience. It determines how to navigate easily “around” information. It arranges what users see, makes certain that the right access to data is presented in the clearest way, and that it is done with the appropriate emphasis. Mike Kuniavsky, author of the book, *Observing the User Experience*, says it best when he writes: “Interaction design is different from information architecture in the same way that the design and placement of road signs is different from the process of laying out roads — information architects determine the best path through the terrain, whereas interaction designers place the signs and draw the maps.”

What a great analogy! The best software does, in fact, help people feel familiar in its surroundings. It helps them navigate through a maze of data and screens so they can easily and more productively accomplish more, in less time, with less effort. As it relates to CRM, success comes from making it as invisible as possible to the people who use it. By providing integrated access to critical client information, relationship-exploring capabilities and marketing lists subscriptions, with programs people already use, firms are able to reduce the learning curve often associated with CRM. They also reduce the probability that people will resist using them altogether. Most recently, Microsoft announced the integration of its Dynamics CRM 3.0 product directly into the Outlook interface. By incorporating CRM functionality into the e-mail, calendar events and contact cards people use every day, Microsoft was able to create capabilities that extend the power of Outlook without building new roads that users have to learn to navigate. Another trend that appears to be gaining acceptance within law firms is the use of data portals that leverage tools, such as Microsoft SharePoint, to bring information from various systems to a single screen. Portals make it easy for users to see the information they need, without ever seeing the systems that host it. In both cases, so-called “usability hindrances” are removed. With the usability obstacles out of the way, firms can intensify the focus on an important goal: spending more time exploring revenue opportunities and nourishing relationships with existing clients and firm prospects.

Developing the CRM Strategy

While thinking that technology is the answer to all your CRM problems is a big mistake, to discard it altogether can handicap your ability to remain competitive. The right analysis of strategy, human processes and technology will help you determine where CRM technology fits within your firm's business-development and marketing initiatives.

Consider the following:

- Do you have a clear vision of your firm's interactions with prospects? Start with a clear understanding of all CRM-specific objectives, *ie*, manage client relationships, access matter-centric information and support opportunity management, business development efforts and marketing events.
- Do you understand the steps necessary to implement your strategy? Many times a firm realizes late into the CRM implementation that the firm's culture, processes and structure must change to make this effort successful. Remember that CRM is a firm-wide effort that will require the support of every functional area and practice group.
- How will you collect information about your prospects and clients? Will this information allow you to truly know them and respond to their needs?
- How will you make information available to attorneys and firm staff? What data security must be in place?
- How will this tool help you assess when a client is ready to do business with your firm, and how will you implement the appropriate processes to make it happen? How will this tool help you increase your book of business?
- How will CRM open new doors for cross-selling opportunities? Intro-duce processes that make it easier for you to discover them.

Intranets and Web portals are great tools that can help your attorneys and firm staff access information from various data sources and systems. Keep Web technology in mind and determine early in your strategy how this technology will be used, and what systems will integrate well.

While utilizing CRM to achieve firm success may not be an ancient Chinese secret made far too difficult to decipher and follow, it does require understanding, planning, commitment and follow-through. Understand the limitations as well as possibilities presented by modern CRM systems; develop a CRM plan and strategy that seeks buy-in from various constituents within the firm, and carefully defines responsibilities and user expectations, as well as goals and objectives. Commit time and resources into launching a successful CRM initiative, and follow-through on predetermined objectives and strategies. The results will speak for themselves.

Julio Quintana is a client relationship advocate and technologist who has written for *PC Magazine* and *Customer Service Magazine* in areas related to client relationship management and retention. His book, *Learning How to Win and Keep Customers*, is scheduled for publication next year. He currently serves as Managing Director of CRM Legal Applications for Atlanta-based Client Profiles, Inc.