

Case study: asb law

Experian helps to create a client-centric CRM system



Client

Data is at the heart of effective CRM. So when asb law wanted to better understand its clients' needs, it turned to systems integration company, Aspective, and Experian to create a client-centric CRM system that would enable it to translate client data into a powerful corporate asset.



Challenge

At its formation, asb law modelled itself as a law firm that would place its clients needs above all else. But as the firm grew it became clear that its existing practice management system was, in fact, hindering the development of effective CRM within the firm.

In order to grow, law firms, like all professional service organisations, need to not only provide high quality services, but also understand their client needs by developing close relationships between lawyers and their clients.

asb law's existing practice system had no means of holding advanced data for analysis of customer profiles and the data that was captured was often incomplete or duplicated. This absence of effectively captured data made it more difficult to obtain a single, customer view, see historical information or effectively identify and segment clients in order to respond to their needs and sell additional services to them in a targeted manner.

Inadequate customer data was leading to poor customer relationships. One challenge, therefore, was to

make data an asset of the firm and it was essential that any CRM system implemented was underpinned with quality data.

The key focus of the activity was to ensure future adoption of the system by embedding CRM into asb law's client engagement process and creating a single client view.

There is a perception that CRM will help law firms achieve a client-centric approach. However, CRM in isolation will never deliver return on investment and really put clients at the heart of the business if the system is perceived as difficult to use. Quite simply, unfamiliar systems that do not link to the practice management systems used daily by fee earners and support staff will not be embraced.

asb law needed a system to provide the focus for all client engagement and ensure the capture of appropriate client data. But to be truly effective and take the firm to the point where that data could genuinely work for the business and drive business development, it also had to encompass its case management system. Without this link to fee, matter and profitability

information and metrics, the CRM system would not provide a means to target clients effectively.

Solution

Working with Aspective, a leading provider of Microsoft Dynamics CRM technology, and Experian, asb law has implemented 'engage', a firm-wide CRM programme, which backed by powerful data sources, is designed to deliver various benefits, including fostering closer relationships with its clients.

Together, Aspective and Experian delivered a custom-built system that works with the current practice management system, yet has as its ultimate aim the ability to give users across the firm a single, client view which forms the basis of all client contact.

Recognising that data is at the heart of effective CRM, the firm asked Experian to extract its client data and enhance it by undertaking cleansing and data hygiene before importing it back into the new system.

Any CRM-based system is only as good as the data within it and by embedding client engagement into 'engage', asb law can ensure that it locks into its clients at the outset, asking questions and gathering information that will enable it to deliver valued services. The result is that asb law is improving the quality of the data captured and staff are taking

ownership of, and responsibility for, the data collected. The engage CRM system encompasses client identity and credit checks developed by Experian, which is helping to maintain data integrity and also provides risk management. At the click of a button, asb law can verify client identities to meet new Money Laundering regulations without asking the client to provide documentation that would have previously taken days or even weeks to obtain. This is an important benefit of the system since the new Money Laundering Regulations that came into force at the end of 2007 now require the identity of directors as well as shareholders and beneficial owners with a shareholding of 25 per cent or more to be authenticated.

Results

By providing asb law with a clear, single client view, 'engage' is improving client relationship management and marketing within the firm and delivering insight into the take-up of services across the client base as a whole. Susan Arnold, asb law's Marketing Director comments "Our enhanced data capabilities mean we can now look at the demographics of our client base and build this back into marketing activity, offering targeted and highly relevant services to clients and measuring the return on our direct marketing activity. The whole programme has led to a greater focus on business development through better relationships right across the board."

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For further information please contact us:

T 0115 9016005
business.information@uk.experian.com

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