CRM Lessons Learned

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Availability – Input's "gotta" be free…

- Gather information from "digital footprints"
  - Outlook Updates
  - Phone Calls
  - Email
  - Meetings
  - Expense Records
  - External Sources
- Corollary – no one has the time to do special data entry for CRM data.

Availability – Output's "gotta" be free

- No one wants to learn new software
- Leverage Outlook
- Automatic notification of key changes in status for clients
- Embed output in regular processes – like working group lists, event management, client mailings, etc.
- Analysts front end ad hoc reporting

Relevance – Breaking the Rules

- We purposely did not push for senior sponsorship.
- We scrapped training classes.
- CRM software was de-emphasized.

Lawyer Value   Organization Value
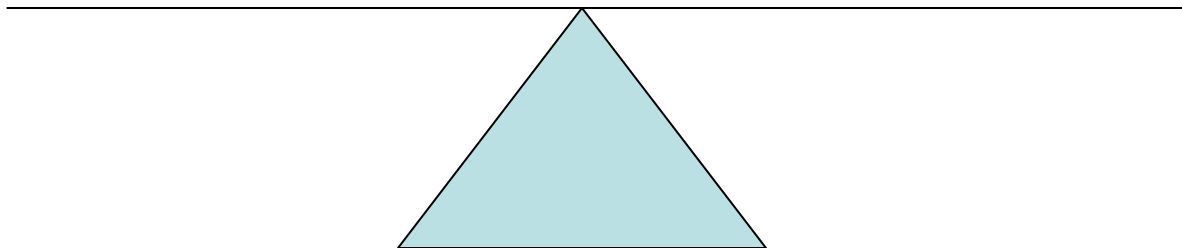
Relevance – Drive Value for Individual

- My contact information – automatically corrected.

- Key firm contact information – automatically updated.

- First Derivative – changes in client status.

- Others who know my client.

- Programs participating in.

- Holistic view of interactions with client.

- What I need when I need it.

# Accuracy – Consistency of Redundant Data
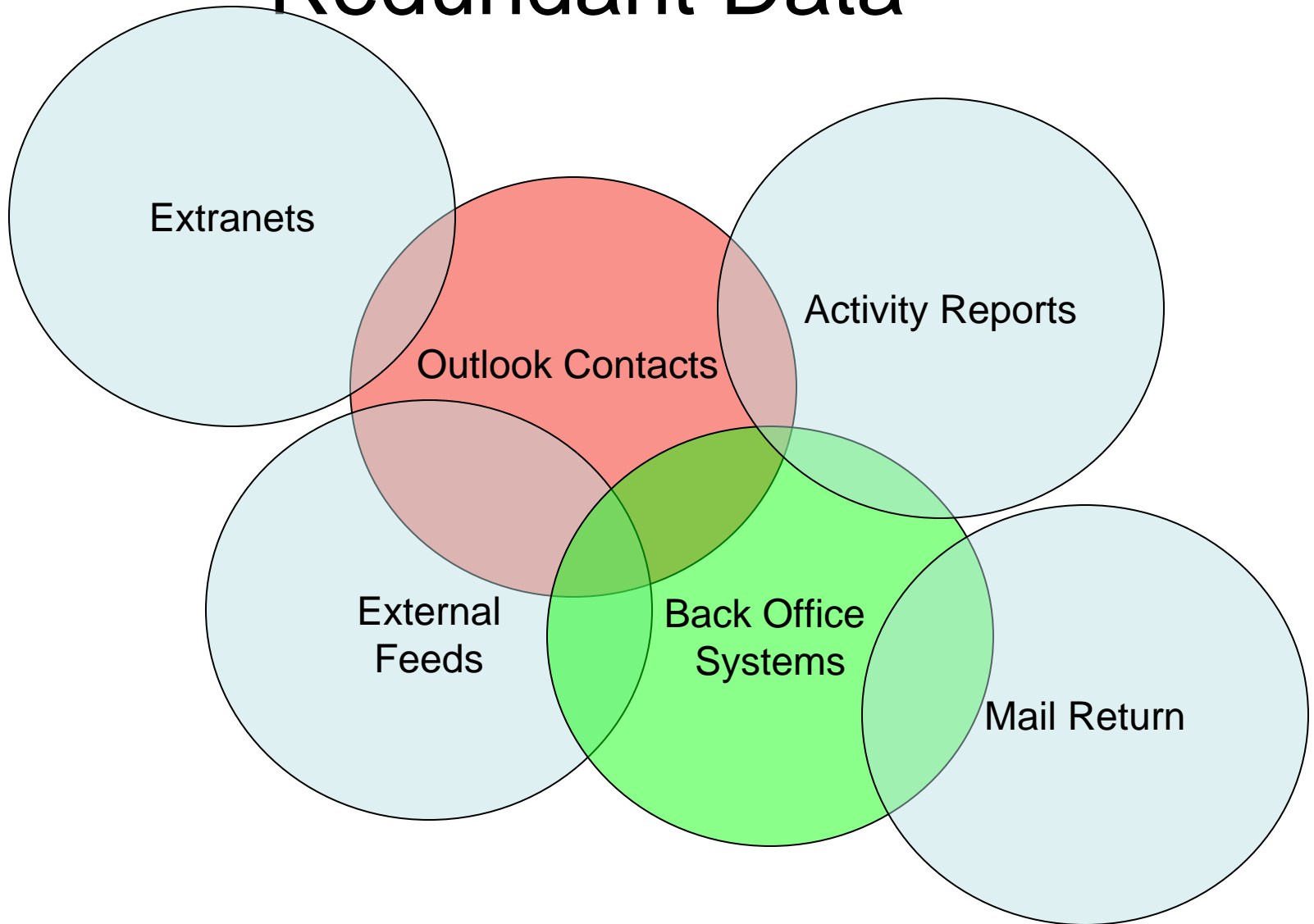
DQ Interactions

- Ways to make *redundant* data *available* to the CRM system are always being researched.

- *Consistency* of *redundant* sources of *available* data are checked as a proxy for *accuracy*.

- *Relevance* for particular needs drive what is made *available* and drives the minimal needs for *accuracy*. Only what is used needs to be *accurate*.

Fitness for Multi-Use

- When the same information is relevant for multiple uses:
  - There can be conflicting desires for securing vs making data available.
  - Accuracy of data may be suitable for one purpose, but not for another.

- Data Quality "brokers" need to be installed.

Fitness for Multi-Use: Relevance Spheres Show DQ Conflicts
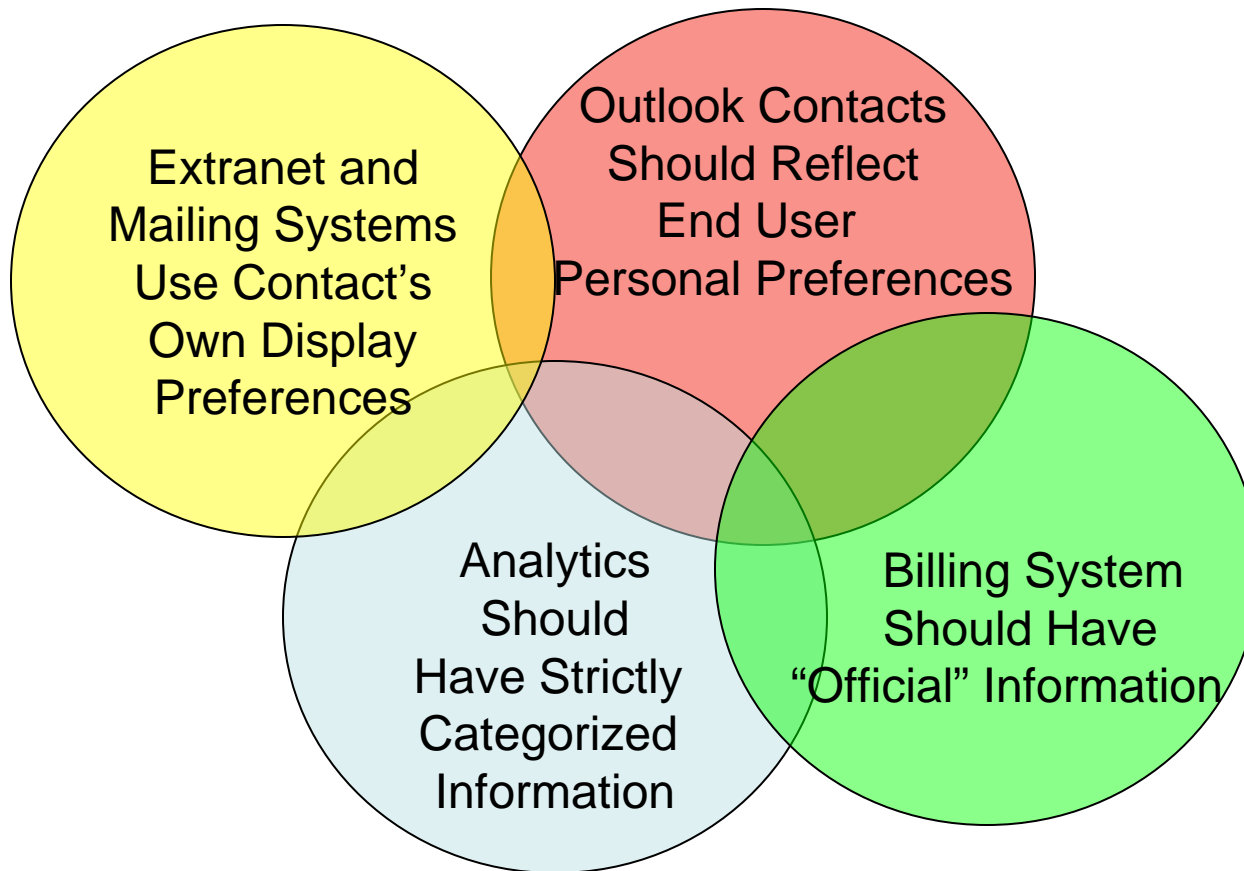
Summary

- Availability
  - Input should be gathered from digital footprints for efficiency, completeness, and accuracy
  - Output should be integrated with normal processes rather than requiring learning new software where possible
- Relevance
  - In CRM, the value to the organization is typically clear. Focus needs to be on creating balancing value for the individual. "CRM 2.0"
- Accuracy
  - Consistency of redundant sources is often a proxy for accuracy
- Interactions
  - One of the biggest challenges is arbitrating the fitness of data quality for multiple uses.