

CRM Lessons Learned

Peter Kaomea

Tandum Lett

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

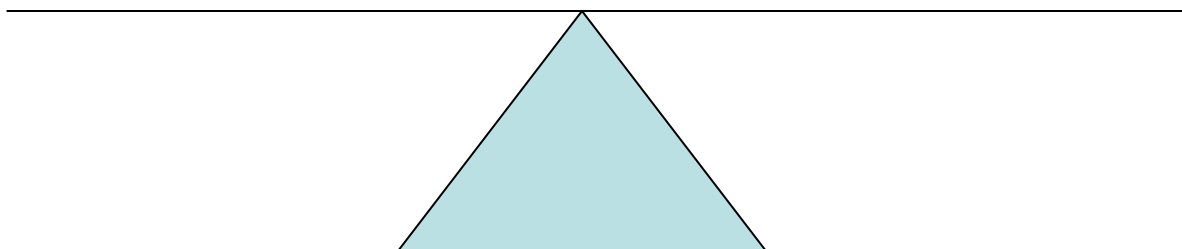
- No one wants to learn new software
- Leverage Outlook
- Automatic notification of key changes in status for clients
- Embed output in regular processes – like working group lists, event management, client mailings, etc.
- Analysts front end ad hoc reporting

Relevance – Breaking the Rules

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

Lawyer Value

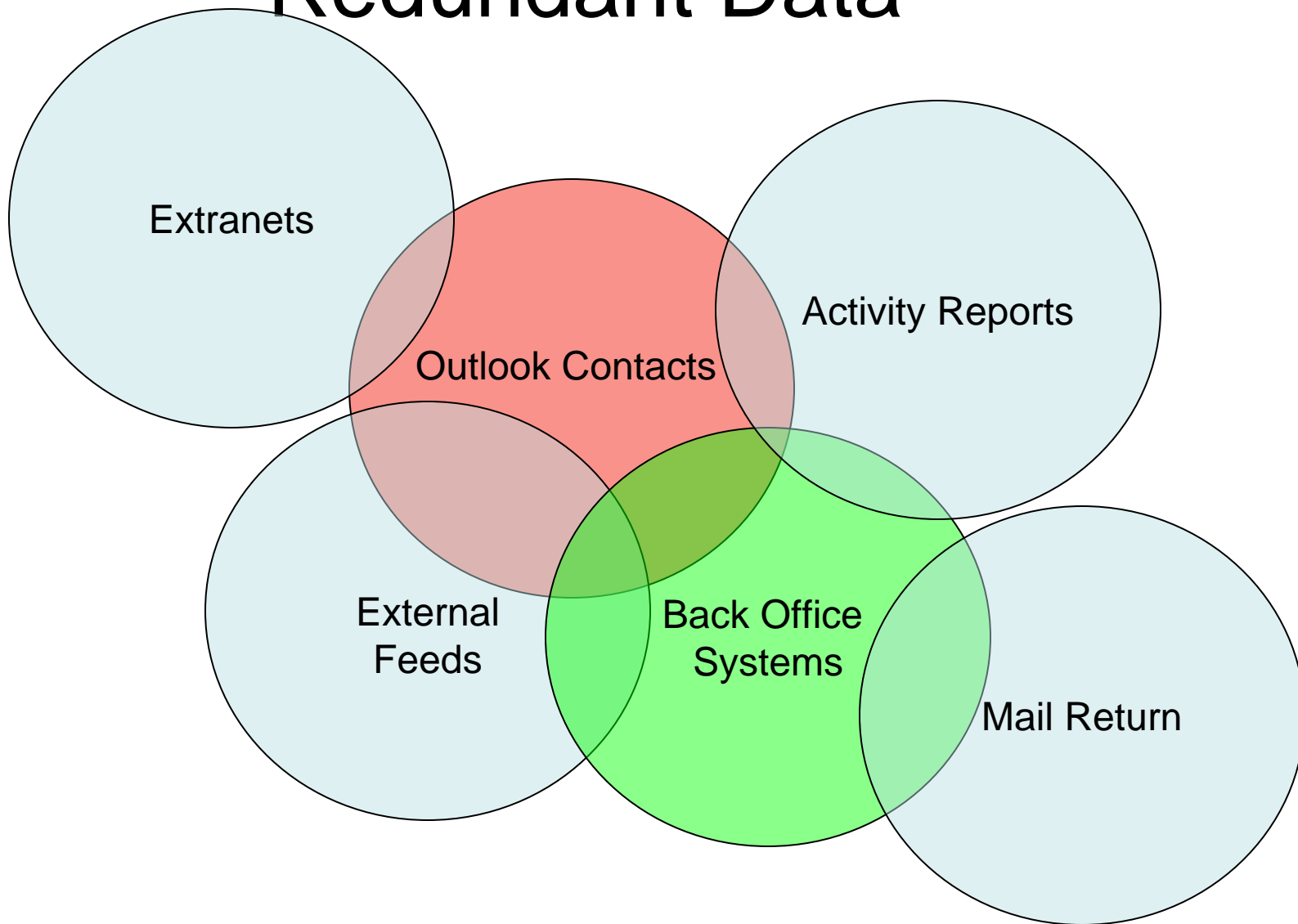
Organization Value



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



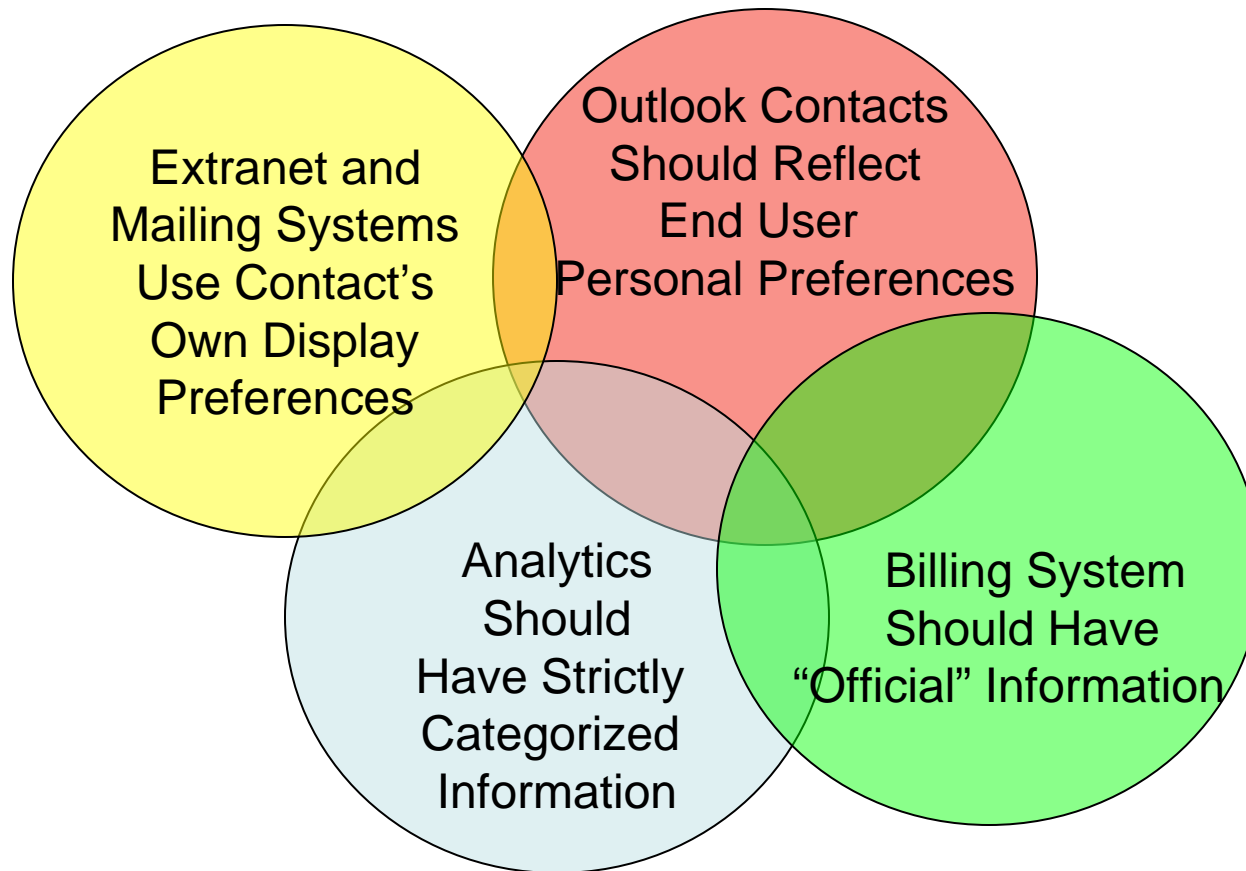
DQ Interactions

- 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.