Farrer & Co Case Study

Company:	Farrer & Co
Industry:	Law
Product:	Lexis® InterAction®

Farrer & Co Increases User Adoption of CRM with InterAction® for Microsoft® Outlook® Deployment

Relationship intelligence enhances responsiveness to client-related developments, aids productivity

Farrer & Co is a leading, London-based independent law firm with 220 fee earners, including 78 partners, and approximately 380 people overall. The firm offers legal services to businesses, individuals and families and charitable institutions across specialist areas ranging from private client, property, tax, commercial contracts, compliance and regulatory, dispute resolution, employment issues, governance, intellectual property, technology and more.

The firm is a longstanding user of CRM solution Lexis® InterAction®, which has been in place since 2005. Recently, as part of a larger Microsoft upgrade initiative, Farrer & Co implemented InterAction® for Microsoft® Outlook® (IMO), enabling users at the firm to access InterAction directly from their Outlook screens.

Olga Christofi, Marketing Systems Manager at Farrer & Co talks to LexisNexis Enterprise Solutions about the difference that IMO has made to CRM adoption at the firm.

For a firm that had already "bought into" the concept of CRM, was it really important to implement IMO?

Olga Christofi: It is true that CRM as a discipline is well embedded into our culture and our way of working, but there is always room for improvement. The convenience of accessing InterAction directly from Outlook, where our lawyers and wider staff spend most of their time when online, is a huge benefit and a functionality that we simply could not ignore. The firm was looking to do a major upgrade of all the Microsoft applications and it was an opportune time to install IMO.

What benefits have you seen of IMO so far?

Olga Christofi: By far, the biggest impact has been increase in utilisation of InterAction across the board. Users can easily look up contacts without having to log into a separate system. Marketing has always been an avid user of the system, but now our finance department is also actively using InterAction. The finance team is able to look up and verify client data residing in the firm's finance system reliably with the information in InterAction, eliminating the need to confirm the accuracy of information with individual lawyers as data in InterAction is updated promptly and easily. This has reduced time spent on data administration too.

InterAction has empowered users with real-time information on contacts, relationships and the majority of client-related matters. IMO has taken the value of CRM as a key business discipline at Farrer & Co to another level.

Are there any features that have proved to be especially valuable to users?

Olga Christofi: The biggest benefit is that users have direct access to contact information and client data from inside Outlook. One needs to just hover over a contact and most of the details show up. Users find the 'alerts' feature extremely useful too as it helps them stay tuned to client developments and the wider firm's exchanges with their contacts – things like who from within the organisation is interacting with them, where there might be upcoming opportunities (e.g. events) to meet with them and so on.

Fee-earners, secretaries, the marketing team and other users now have a personal motivation to keep InterAction updated – visibility of the status of contacts and interaction of others with their connections is attractive and hence we are seeing a greater interest in users to keep the database updated. This is easily done as any changes or updates to contact information can be made while in Outlook.

The relationship intelligence available to the firm is proving to be truly valuable. Users are able to react immediately to client-related developments. For instance, different practice teams are able to share information and nuances on common clients prior to meetings, which are made visible by IMO. Also, recently a fee-earner was alerted to his colleague from another team interacting with a client with whom there was a conflict of interest - something he previously needed to browse a separate system for.

Does the firm have any future plans to further integrate CRM into the processes?

Olga Christofi: We are currently exploring ways of further optimising InterAction. Immediately, we are looking to integrate InterAction with an eMarketing tool that we are in the process of purchasing. Once implemented, it will not only help refine and further streamline our marketing activities, but through IMO users will have instant visibility of what company correspondence/newsletters/content is generating interest among current clients and prospects. This information will be insightful for other future marketing activities as well as for users' dealings with their clients and prospects.

We are also looking to truly maximise the use of InterAction as a business development tool. We would like to use it for lead generation, cross-selling opportunities and even to extend our relationships across geographies.

InterAction Mobility is a logical next step too – with the use of mobile devices the norm and our lawyers spending so much time out of the office, the ability to access information – not just contact details, but things like personal notes, data on previous meetings and communications on the go – will be beneficial and aid efficiency and productivity.