Berrymans Lace Mawer LLP
Case Study

Company:	Berrymans Lace Mawer LLP
Industry:	Law
Product:	Lexis® InterAction®

Secret to Success – Close Collaboration Between LexisNexis® Enterprise Solutions and Berrymans Lace Mawer LLP Delivers Lexis® InterAction® On-time and Budget

Berrymans Lace Mawer LLP (BLM) is the UK and Ireland's leading risk and insurance law business. The firm specialises in advising insurers, Lloyd's syndicates, underwriters, managing general agents, brokers, corporate policyholders, public sector organisations, professional indemnifiers and other market organisations. The firm has expertise in advising clients operating in a wide range of sectors including construction and property, healthcare, leisure and retail, transport and logistics, professional services, the public sector, manufacturing and in the London Market.

Recognising the need for a best-of-breed CRM tool to assist with business planning and strategic marketing following the firm's exceptional growth, BLM selected Lexis® InterAction® as its solution of choice in 2012. Zoe Uddgren-Young, CRM & Digital Marketing Manager *at BLM offers LexisNexis Enterprise Solutions insight into what made the project implementation such a wholesale success – it was delivered on time and budget.*

Is there anyone factor that stands heads and shoulder above everything else that contributed to the successful deployment of Lexis InterAction at BLM?

Zoe Uddgren-Young: To deliver a project of this scale – 10 offices and over 300 users – there isn't a single factor that scored us success. However, this was truly a collaborative

deployment between BLM and LexisNexis Enterprise Solutions, which provided a strong foundation for the project. Our LexisNexis account manager didn't hold back any punches – he told it as he saw it! This candid approach allowed us to take advantage of the LexisNexis team's extensive experience in delivering such projects. In addition, at our end, we ensured that the project was well-resourced. Unusually, a Project Board comprising four senior partners, a 3Kites consultant, head of marketing and CRM & digital marketing manager was instituted – in addition to which circa 20 individuals across IT and the LexisNexis project team. To ensure security, we also had members of the IT security team and a partner specialising in data protection who we called upon for advice.

With such a large team, how did you plan the implementation? How were roles and responsibilities allocated to team members?

Zoe Uddgren-Young*:* We spent a lot of time intricately planning the deployment – right from requirement assessment and IT through to training. In fact, our requirement gathering process was exhaustive. The BLM project team conducted 21 partner workshops to assess staff requirements from a CRM perspective. In addition a further series of workshops with the core team were facilitated by LexisNexis to ascertain data sources and gather business development requirements. The team challenged existing processes to eliminate inconsistencies and implement best practice. Our Marketing team critically examined contact database usage and devised contact classification for InterAction. It established controls/processes to enable data stewards to ensure information integrity at all time in the future. The teams also jointly reviewed the touch-points between Marketing, Events, Business Development and other functions to streamline processes, including procedures for data change management and campaign reporting.

Presumably, you would have done a pilot before rolling-out the solution. What approach did you take?

Zoe Uddgren-Young: I think our approach to the pilot was fairly atypical. We intentionally chose a group in the firm with the most challenging set of business requirements to pilot InterAction. Constructive feedback upfront is necessary to shape a solution. This enabled us to ensure that InterAction would meet the needs of all. Also, this group was located across multiple offices, and was already undertaking several strategic CRM campaigns manually. It was in real need of a tool to track, measure and report on progress. By using it as the pilot, we very successfully secured its buy-in – the group was able to see the value of InterAction. In doing so, we actually pre-empted any future resistance to using the solution that could potentially have surfaced.

You mentioned training earlier. Did it help with user adoption of InterAction at the firm?

Zoe Uddgren-Young: From past experiences of delivering projects, user training is often a stumbling block. In fact, LexisNexis arranged visits for us at firms that were already using InterAction so that we could learn from the experiences of other organisations. All the firms highlighted training as key to adoption too. So we were determined to deliver a training programme that was relevant to employees. It was delivered by LexisNexis, IT and Marketing in the context of individuals' roles to demonstrate functionality, value-add and benefit; and highlighted the most attractive and user friendly feature – InterAction's integration with Microsoft Outlook. Post training, we also provided competency check-lists and undertook at-desk visits to supplement class room sessions.

User adoption has been phenomenal! In a six month period, 40,383 data change tickets have been issued; 9,499 new contacts added; 1,549 CRM and 2,512 marketing activities entered by users. For the first time, more than 160 partners are connected to the CRM data, business development campaigns and opportunities for growth visible and duplication of effort is being eradicated.

What other business benefits have you seen?

Zoe Uddgren-Young: The time efficiency and productivity that InterAction delivers is staggering. For marketing operations, opening a marketing list previously took 14 seconds, and updating a field 18 seconds – today both take a second each. Our legacy system didn't allow more than 2100 contacts to be exported to Excel at a time – InterAction exports an entire list, regardless of size, in four minutes. Most crucially, CRM is becoming embedded in the firm. This is allowing us to optimise our processes – while we can't quantify those benefits; it is making many aspects of our day-to-day business operation smoother.

So where next from here?

Zoe Uddgren-Young: Project InterAction is ongoing – to make CRM more efficient, valuable and user-friendly. Typically, both firms and vendors view technology deployments as one-off implementations rather than continuous business initiatives. We at BLM and LexisNexis are already investigating additional ways of integrating InterAction with our practice management system and other technologies to deliver a 360 degree picture of practice development activity.

Quotes

Terry Renouf, Partner, Berrymans Lace Mawer:

"I was on the InterAction Project Board along with a senior partner – it was important to have that senior engagement with the project from the very outset. It's been a really good project for us because we did all the planning at the beginning. We asked the client partners what they needed from the project and what they wanted to see as the outcomes. We spoke to them through-out the process, and involved them in training all the way. They knew at every stage what to expect from the project.

"I recommend InterAction because it is easy to use. It is integrated with Outlook, which means everybody in the firm can see who we are in touch with and what we are doing."

Antony Chesson, Consultant, 3Kites:

"One of the key reasons for the success of this project was that 3kites, BLM and LexisNexis all worked so well together. It was a real collaborative team effort. We were all focussed on how to deliver the project and the best way to deliver it to satisfy all the major goals."

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