



Lexis® InterAction® Key Success Indicator Audit Helps Appleby Focus on Tangible CRM Improvements

Lexis® InterAction®

Appleby Case Study

Industry: Law | Product: Lexis® InterAction®

Appleby is an offshore law firm with around 470 staff, including 60 partners. Offering services including corporate, dispute resolution, private clients and trusts, property and regulatory, the firm advises public and private companies, financial institutions and high net worth individuals to help them achieve practical solutions.

Appleby has offices in Bermuda, the British Virgin Islands, the Cayman Islands, Guernsey, Hong Kong, Isle of Man, Jersey, Mauritius, the Seychelles and Shanghai.

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Alison Jesset, CRM Manager, Appleby

Appleby has been using CRM solution Lexis® InterAction® for more than five years. The firm recently commissioned LexisNexis Enterprise Solutions to undertake a Key Success Indicator (KSI) Audit, a best practices framework to define and measure the vital areas that result in successful InterAction initiatives. Alison Jesset, Global CRM Manager at the firm, talks to LexisNexis Enterprise Solutions about the firm's rationale for this exercise and the value it delivered.



Enterprise Solutions

What was Appleby's business driver for undertaking a KSI Audit?

Alison Jesset: Having used InterAction for a reasonable period, we felt it was a good time to assess how the firm was using the solution and gain insight into which CRM-related areas we could focus on, optimally use our resources and have the best probability of success. As tends to happen over a prolonged period, data quality decays, which in turn deters people from using the solution as they deem the information to be unreliable. This impacts overall CRM adoption in the firm.

What process did you have to undertake to conduct the KSI Audit?

Alison Jesset: Most people presume that an audit is hugely disruptive and time consuming, but the entire process took just 30 minutes. Our Client Advisor asked me a series of questions, and based on the responses, presented us with a detailed audit report that highlighted the areas, that with a small investment of time and energy, would deliver the greatest rewards to the firm.

To illustrate, the audit covered 14 key categories such as business goals and objectives, measurement and budgeting, staffing, data quality, marketing, business development, reporting and analytics and so on. For each area, there was an audit score, a target score and percentage of the target achieved. This scoring helped us understand the areas where our InterAction strategy and activities were in line with successful best practice behaviours and those where attention was required.

Please give examples of how you have used the findings of the KSI Audit to make improvements.

Alison Jesset: For us, the timing of the audit was excellent as I was in the throes of writing the CRM strategy for the firm. In the areas where we measured low, I was able to include specific metrics to meet the defined goals. For instance, we weren't optimising the use of InterAction to make efficiency gains, so we were able to cater for re-design of some of our processes to correct the situation. Similarly, we planned for creating and implementing a more robust data strategy – dealing with stagnant data, reviewing new contacts and other critical data going into the system, and instituting proper naming conventions. Because the KSI Audit was so comprehensive, we were able to extract very specific actions, which we could build into a project plan.

Was the KSI Audit able to highlight any major issues with InterAction's usage that the firm wasn't aware of previously?

Alison Jesset: With offices spread across regions, it's not always easy to know what issues users are having in other offices. As I was determining the changes that needed to be made in order to hit the target scores in the Audit, I met with users in our Isle of Man, Jersey and Guernsey offices to understand their challenges. I learned that there was no folder archiving policy. As a result, every folder that had been created since the solution originally rolled out was visible to users. They were therefore struggling to effectively navigate the system to find the folders that they needed. So we put the necessary policies in place for out of date folders. We had 4000 folders in the system and we were able to get rid of 2,500 of those.

Similarly, we have been able to establish best practice processes for how users should be managing their contacts.

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Have users specifically benefited from the improvements made following the KSI Audit?

Alison Jesset: Definitely. Previously, although there was a lot of valuable information in InterAction, we simply couldn't extract the data for business use. Now with the changes we have made, the legal professionals are benefiting from gaining valuable insight and it is far easier for the secretaries to understand and better appreciate the reporting from within InterAction and how it is supporting their legal professionals in achieving their business development goals. Similarly, the marketing and business development teams have benefited greatly from the enhanced quality of reporting from InterAction across all aspects of activities.

Since implementing improvements that the KSI Audit highlighted, have you been able to determine any tangible improvements?

Alison Jesset: We have made huge strides in the way we now manage and archive contact data. Tracking activities is critical to us and so we have introduced very strict policies and guidelines around the capture of activity data.

We are also managing event data much better. Previously, all the information captured at events was within the additional fields, which was making it very difficult to extract insight. The data was being held against the folder, which made reporting really difficult. So we changed the additional field into activities, which has made reporting a lot easier.

From the business goals perspective, we looked at the global programmes we were running including the key client relationship and referrals programmes, and aligned InterAction with these.

We weren't optimising the use of InterAction to make efficiency gains, so we have re-designed processes to correct the situation.

Would you recommend a KSI Audit to other firms?

Alison Jesset: Most definitely. It is an excellent exercise – it makes you really think where you are with CRM as a discipline and with the usage of InterAction with the goal of optimising their value to the firm. It's certainly worth doing on an annual basis as it allows you to track your progress against the defined benchmarks.

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Alison Jesset, CRM Manager, Appleby



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For more information

To find out more about **Lexis® InterAction®** and to discuss your company's specific business requirements, please visit: www.lexisnexis-es.co.uk/interaction

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