



Lexis® InterAction® Health Check  
Helps Farrer & Co Re-align CRM with  
Business Needs

Lexis® InterAction®

## Farrer & Co Case Study

Industry: Law | Product: Lexis® InterAction®

**Farrer & Co is an independent law firm with over 400 employees. It provides a broad range of specialist legal services to private and commercial clients - from charitable institutions and private families and individuals, to asset managers, media groups and sports governing bodies.**

Many of the firm's lawyers are recognised by external commentators as leaders in their fields. Their standards are exacting, and clients value them for their professional excellence, broad perspective and practical solutions. It is no surprise, then, that the firm expects the best from its systems.

*"The Health Check provided a 'fresh pair of eyes' and helped us to identify and eliminate the clutter. In actual fact, we are still implementing the improvements."*

Olga Christofi, Digital Marketing Manager, Farrer & Co

Farrer & Co is a longstanding user of CRM solution, Lexis InterAction. Recently, the firm commissioned LexisNexis Enterprise Solutions to conduct a Health Check on the firm's usage of InterAction. *Olga Christofi, Digital Marketing Manager at Farrer & Co, talks to LexisNexis Enterprise Solutions about the value of the Health Check to the firm.*



Enterprise Solutions

## What triggered the need for a Lexis InterAction Health Check at Farrer & Co?

**Olga Christofi:** We have been using InterAction for over 10 years and during the course of this time, despite our best efforts to keep our data clean, we inevitably accumulated legacy data. Also, our business objectives have changed since we first started using InterAction. We felt it was time re-evaluate and refresh our use of the solution and better align it with our firm's strategic goals.

However, we are a very small team of just two individuals. So, we requested LexisNexis to conduct the Health Check for us.

## How was the Health Check conducted by LexisNexis Enterprise Solutions?

**Olga Christofi:** It was conducted by a LexisNexis consultant, who spent a day auditing the solution and a week later submitted an in-depth report of his findings. The process was extremely smooth and hassle-free, there was no disruption to our day, what so ever.

We were pleasantly surprised with the detailed findings that the audit report presented. We were of course expecting an overview of the database configuration and technicalities around it, but in addition to this, there was a fair amount of strategic input. For example, the report offered recommendations on how to improve user adoption, fine-tune our CRM strategy based on a re-evaluation of Data Change Management configuration, enhance CRM administrators' understanding of InterAction, and so on.

## Were there any findings in the report that were of exceptional value to you?

**Olga Christofi:** Overall, the report was exceedingly positive, which gives us a lot of confidence in our adoption of CRM. We are reassured that we are approaching and leveraging both the CRM discipline and the technology in the right way.

The recommendations of the report collectively have enabled us to tidy up our database, update the configuration in tune with our current business needs and align the system with our present-day strategic objectives.

There were a number of house-keeping ideas and insight that the report provided to help us finesse our database. It highlighted which archives we could get rid of, lists that could be merged, and so on. For example, there were 2,068 contacts that didn't have corresponding phone numbers or email addresses. There were more than 400 searches that went back a good few years that we could remove from the system. There were over 14,000 contacts with no 'contact types'.

On a strategic level, there were interesting suggestions on how we could better approach segmentation of clients in InterAction; and also, how we could improve the links between InterAction and other business processes.

## Are there any recommendations you have actually executed?

**Olga Christofi:** There are many recommendations from the report that we have since deployed. For example, we had too many 'contact types' in the system, so we cut them down significantly. We had some legacy relationships in the system, which we never used, so we have removed them to eliminate the clutter. We have also tied up the unnecessary fields we had in the system. Most of the recommendations are iterative and incremental in nature. The Health Check provided a 'fresh pair of eyes' and helped us to identify and eliminate the clutter. In actual fact, we are still implementing the improvements.

*"InterAction supports business development initiatives such as 'Key Accounts' and we are working with the sector teams to help better the data for these programmes."*

Olga Christofi, Digital Marketing Manager, Farrer & Co

## Aside from the specific practical recommendations, what business benefits has the Health Check delivered?

**Olga Christofi:** Foremost, data quality. With the help of legal professionals and secretaries, we have cleansed and appropriately archived the data. We have archived about 10 per cent of the contacts and out of date data so far.

Based on the suggestions of the report, we are now actively capturing more information at the point of data entry. InterAction supports business development initiatives such as 'Key Accounts' and we are working with the sector teams to help better the data for these programmes.

The process of implementing the findings of the Health Check has raised the profile of InterAction among partners and legal professionals. We are seeing them take active interest in the data. The reports we provide them from InterAction prompt them to keep their contact details updated. They recognise their responsibility to ensure the integrity of the data.

Since the data cleansing, our marketing and business development teams have noticed less bounce backs and better results with initiatives. Today, typically these teams run over 100 events a year and 10 mailings a week.

Finally, we are reassured that our database is in good shape, it is accurate and that we can safely rely on the data for our day to day activities.

## Would you recommend a Health Check to other organisations?

**Olga Christofi:** Absolutely. This exercise helps to focus and customise the system to an organisation's needs. Usage over a period of time often results in the solution being gradually over-engineered. A Health Check allows a firm to step back and re-evaluate requirements to fine-tune the system so that it meets the current needs of the business. The entire process helps instill confidence in the technology, which is essential to have in a business system that is used on a daily basis in the firm.

*"The process of implementing the findings of the Health Check has raised the profile of InterAction among partners and legal professionals."*

Olga Christofi, Digital Marketing Manager, Farrer & Co



## Contact Us >

**Lexis® InterAction®**

### 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](http://www.lexisnexis-es.co.uk/interaction)

e-mail [salesinfo@lexisnexis.co.uk](mailto:salesinfo@lexisnexis.co.uk)

or call **+44 (0) 113 226 2065**

to speak to a LexisNexis Enterprise Solutions consultant.