

Case Study: Berger Singerman Technology

Company: Berger Singerman Technology
Industry: Legal
Product: LexisNexis® InterAction®

Berger Singerman, founded in 1985, is a Florida-based business law firm with offices in Miami, Fort Lauderdale, Boca Raton and Tallahassee. It serves a diverse client base, and the firm's attorneys hold prestigious honors in third-party rankings and listings. Attorneys work in four teams including Business Reorganisation, Dispute Resolution, Government and Regulatory, and Transaction.

As technology goes, Berger Singerman is at the leading edge with advanced systems, software, hardware, and client development, practice management and workflow solutions in place.

From the onset, the firm's cofounders were early adopters of technology. State-of-the-art telephone and BlackBerry® systems with every attorney having a laptop streamlines the workflow on location for attorneys who need to travel to service clients. Wireless connections within each office enable visiting clients and guests to access the Internet. Video conferencing became the most recent addition to the firm's technology suite.

Implementing CRM

Also a necessary part of the firm's infrastructure is its Customer Relationship Management (CRM) solution. Berger Singerman selected InterAction® in 2004 to

complement its advanced accounting and document retention systems. Prior to implementing InterAction software, the firm's relationship intelligence was not in an organised system.

Now, after top-down adoption by the firm's management team, InterAction is the widely accepted client development tool in every office and utilised by every team at Berger Singerman.

To ensure infrastructure functionality, the firm hires the right people to drive the ship. Lori Rabinowitz is Director of Marketing & Recruitment, a post she has held for more than three years. When it comes to technology for the firm's marketing and business development efforts, she works with the firm's IT director, and as a team they implement the necessary programs.

At a previous position, Lori was introduced to InterAction. Upon joining Berger Singerman, she was pleased she could continue utilising the solution to streamline workflow and productivity at the law firm.

Her role has been to promote and encourage usage and adoption of InterAction throughout the firm. To ensure everyone's comfort level and to pique competitiveness, Lori makes training fun with lunch n' learns and contests. Everyone from legal assistants to partners participate and there is a monthly contest for legal assistants - ensuring that everyone in the firm is responsible for CRM. Cash prizes in the amount of \$200 and \$100 are awarded for first and second place, respectively. InterAction training is held throughout the year for all offices, even sometimes via video conference.

The firm saves up to [an estimated] \$60,000 in billable time annually by eliminating the need to respond to basic fact-finding e-mails about clients and prospects.



Enterprise Solutions

Using InterAction

Every attorney populates the InterAction program daily, and the outcome is streamlined and comprehensive information to expedite mailings, provide reports, track activity, detail client profiles, share conversations and more. Some attorneys even use InterAction to implement advanced and customised marketing campaigns.

As for business development, everyone is expected to participate. As part of the firm's culture, it is a shared responsibility that all attorneys originate business - both associates and partners - and the firm provides the resources to do this. To track who each attorney was meeting with, InterAction became the source attorneys use. While attorneys know how to manage their billable time in the firm's accounting system, InterAction became the system to track business development time.

Although InterAction is becoming the preferred solution to track business development activity, there is more to learn and implement. Currently, Lori is responsible for compiling and analysing business development reports, and she expects the data to become even more valuable as partners get in the habit of adding information about their business development activity with prospective clients.

Little by little, as she introduces more advanced functionality to the practice teams, Lori stresses the main message to every user as, "the information you get out is only as good as what you put in." She challenges herself to be more informed and action oriented to reap the benefits InterAction brings to the firm's productivity, workflow and efficiency.

Today, most of the firm's attorneys and legal assistants recognise the advantages of having InterAction software:

- Lori estimates the firm saves up to \$60,000 in billable time annually by eliminating the need to respond to basic fact-finding e-mails about clients and prospects.
- No more independent PDA, Rolodexes or personal databases are used for business development.
- All offices of Berger Singerman can tap into one uniform CRM solution regardless of location.
- Company-wide mailings have become highly efficient - an 85 percent reduction in time needed to execute holiday communications.

As a recruitment tool, Lori benefits from existing profiles of any candidate who has interviewed with the firm. She also can review dates, comments and evaluations from interviewers.

What the future holds are more growth opportunities. Lori recruits many staff members to be part-time data stewards to administer data input, tracking, reports and analysis. Associates who join Berger Singerman learn early on they can create their own destiny and drive their future. The entrepreneurial environment dictates that success pathway.

"You're only as good as the weakest link," said Lori. "Our investment in infrastructure, training, technology and a team-oriented business model gives everyone a level playing field to be extremely successful."

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