Case Study: Berwin Leighton Paisner

Company: Berwin Leighton Paisner
Industry: Legal
Product: LexisNexis® InterAction®

Berwin Leighton Paisner's mantra is "More than you would expect from a law firm," - and it's no wonder. Just over three decades old, the firm has graduated from 'real player' to 'heavyweight' in the real estate and information communications and technology markets. Arguably one of London's most technologically progressive of the city's top 20 firms, Berwin Leighton Paisner is a 21st century pacesetter.

Understanding the Value of Relationships

The 400-plus fee earner Berwin Leighton Paisner has acted as an Internet Incubator, a European technology consulting and business group focused on building companies in the B2B technology infrastructure industry, and has also represented Prudential, Del Monte, Burberrys, Chase-Episode, BG (British Gas), Railtrack, Shell, Ministry of Defence, The Treasury, BAA, and Royal Bank of Canada.

In 1996, Berwin Leighton Paisner recognised the need to implement a firm-wide solution that would identify, aggregate and manage its copious amounts of internal relationship knowledge about people, companies, relationships, experience and expertise and deliver it in a meaningful way to end users.

"We quickly realised that individuals' paper rolodexes, Excel spreadsheets and handwritten notes were no longer the best way to access and store relationship information," explained Berwin Leighton Paisner's Information Technology Director Janet Day. "Our firm was in need of a better means to cultivate, centralise and easily share relationship information across all channels. We envisioned technology that would allow fee earners to leverage the relationship information in the system for client development and to distinguish our firm."

The Selection Process: A Sound Methodology

To ensure that it was investing in a superior solution, Berwin Leighton Paisner's technology department began the selection process by establishing criteria for the software. "We produced an internal survey aimed to define what our staff wanted the system to achieve," said Day. "We determined that the software would have to 1) fit the way we worked, rather than us altering our practices to fit the system; 2) integrate with our existing systems; and 3) be straightforward to use."

"We looked at products in the UK market and came to the conclusion that there really wasn't anything. We then looked on a global basis and identified two or three other products that were available. All of which happened to be States-side products," said Day.

"We selected the InterAction CRM solution for several reasons," said Day. "For one, InterAction works in collaboration with PC DOCS, our document management system and has a Microsoft SQL back-end. We are a SQL server house so it was important that the software be supported by a SQL back-end. Secondly, InterAction allows our marketing department to derive statistical and quantitative data – helping them to say, analyse the success of a particular event and arrange a more targeted approach for campaigns. Finally, Interface Software

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Successful Implementation of InterAction

Those involved in the initial decision-making process created a unique way to get the employees excited about InterAction. "We started with a very small pilot group which was selected among different departments. We combined users that performed diverse asks within the firm," said Day.

"Those particular users attended training sessions that covered a broad range of InterAction capabilities. We then asked the participants to give us feedback on the sessions that they attended. Based on those initial responses, we were able to analyse our approach to training. We decided it best to address our staff in smaller groups for larger increments of time instead of only getting their attention for 20 minutes at a time. This approach had a positive reaction, so we continued to use it for the remainder of the rollout."

Next, Berwin Leighton Paisner began rolling out InterAction firm wide. They opted to deploy the software departmentally, and had small groups within each department train each day. "We discovered that small groups really defined our ability to sustain the training numbers. We were able to address everyone's questions or concerns while providing one-on-one attention. Those individuals also provided valuable feedback."

Mark Waghorn, a partner in our property finance department, said he believes the small group approach was an important aspect of the implementation. "I think it was actually a very clever way to establish the value of InterAction. It heightened awareness while fostering a positive attitude about the product. The system became more than just an anonymous bit of software to our firm."

Recently, the firm deployed InterAction® for Microsoft® Outlook® throughout the firm. This component provides bi-directional synchronisation between Microsoft Outlook® databases and InterAction. Fee earners can use Outlook to manage their contacts while simultaneously contributing to InterAction's central knowledge database. InterAction for Microsoft Outlook integrates the benefits of InterAction with the MS Outlook desktop.

Berwin Leighton Paisner is also importing data into the system using InterAction Application Collaboration, which brings relevant client relationship data from a firm's disparate systems such as accounting or time and billing and provides content to InterAction. Fee earners can view all facets of their client relationships including contacts, marketing data, relevant financial data and projects. "We have been using it since [InterAction for Microsoft Outlook] came out and are very happy with it," said Day.

Firm-wide Acceptance: Users Recognise the Value of Relationships Through InterAction

"InterAction has been invaluable in helping us facilitate the building of relationships," said Marketing Director, Gillian Khan. "When we are developing a potential client for example, it is very useful to do a search in InterAction and find out who else in the firm knows the prospect. Similarly, when we host an event, which we do regularly, we can now talk to most people there and say, 'I gather you are so and so, or I understand so and so at our firm worked with you at a prior company. We know a lot of information about the attendees that is impressive to them. We can even approach a total stranger, look at the name badge and say, 'oh, you know our colleague, so and so.' People really like that. I think that is very powerful. It polishes our firm image and we make a good impression on others when we know something about them."

Samantha Marshall, the firm's Contacts Database Administrator, said prior to InterAction, she had to run her database and mail merges on an Excel spreadsheet. "It was a very long-winded process to try to find a contact," explained Marshall. "In addition, there were a lot of cross happenings - a contact may have changed his or her address and I had no way of knowing. It is much better to have all of the information in one place."

For the marketing tasks, Marshall said she uses InterAction to keep names, addresses and details about contacts up to date for every marketing event. In particular, she finds the 'Notes' feature useful. "I input notes about contacts that everyone at the firm can see. When someone has to do business with a contact, they can see what the history has been and where the relationships exist in the firm."

Janet Day added that from a business development standpoint, InterAction has made measuring results of marketing events easier. "The marketing department needed to be able to analyse the success of different types of events. They now have the ability to capture the statistical and quantitative data critical for developing targeted marketing events and fostering close relationships. The rest of the firm needed the ability to look at the progress of an event such as who has responded and who hasn't, without actually sending a request to the marketing department."

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