LexisNexis®

ENTERPRISE SOLUTIONS

InterAction®
Advancing CRM

Sinead O'Hara

Senior InterAction CRM Data Executive
Bryan Cave Leighton Paisner LLP

WINNER: Sharpening Your Customer Insight

1. Congratulations on your award win, how did it feel to be recognised for taking BD to the next level?

I was really shocked but obviously very flattered to have been nominated, never mind actually win!

2. In your own words what has the journey been like for you personally both at Bryan Cave Leighton Paisner LLP and your previous firms?

I've found when the firms are very early on in their CRM journey, you spend a lot of time convincing users that the tool will make life better; and when the firm has a really established CRM system, the time is spent convincing users that it's more than just a phonebook! So it can always be a bit of an uphill struggle. It's those challenges I really enjoy, so although at times (thinking about GDPR in particular) the journey has been difficult personally, it's something I really find satisfaction in.

3. Those who nominated you, spoke of your tireless work ethic when it comes to not just driving adoption but enabling your Business Development (BD) teams to generate insights from the data and track engagement, why is that important and how have you achieved this?

Generally, InterAction at our firm is relatively well used in terms of keeping contacts up to date etc., however we needed to ensure that the reporting and stats side of the system worked for users. With a focus on pitching, reports were developed to allow teams to keep track of all the open opportunities, and the wins over the last year. Coupled with a weekly meeting, it meant that teams were more likely to keep their opportunities up to date and allows us a far better view of what is working and what isn't for us in terms of pitching. Adding external tools from both Stanton Allen and Fellsoft has helped hugely too, automating many of the processes we were doing manually before.

4. In your opinion what are the two key ingredients when driving user adoption within BD teams?

The two most important ingredients for me are communication of requirements and training. You can't encourage adoption of a product that doesn't work for someone, or if they can't use it!

5. In a training session with a Partner you have 5 minutes what do you say/show?

The opportunities module or how to find who knows whom relationships!

6. How do you achieve the work life balance whilst juggling a very busy job changing the face of CRM and BD alignment internally?

Some days it's tough, but generally I can always find time for wine!