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Susan Arnold, Marketing Director, asb law



Vodafone company helps law firm drive organic growth using CRM

Fast facts

Customer: asb law

Web site: www.asb-law.com

Number of employees: 300

Country or region: United Kingdom

Industry: Legal

Customer profile

asb law, one of the largest legal firms in the south of England, offers legal services to businesses, public sector bodies, and individual clients across the country.

asb law, based in the south of England, wanted to deploy a CRM solution to help market and sell services to new and existing clients. At the time, personnel found it challenging to analyse data to a granular level, identify targets or cross sell products. By working with Vodafone company Aspective, asb law rolled out Microsoft Dynamics CRM. Today, users see business opportunities instantly because of service gap analysis tools. Equally important are the new marketing and sales tools that will help the firm improve the effectiveness of campaigns and client events.

Situation

asb law is one of the largest legal firms in the south of England. Its 36 partners and 250-plus legal and support staff deliver services to businesses, public sector bodies, and individual clients across the country. The firm's two key aims are driving organic growth by attracting new business and selling additional services to existing clients.

Achieving these aims was made that much harder by the fact employees found it challenging to analyse client data to a granular level, identify targets or cross sell products. Existing case management and practice management solutions supported transactions, but neither helped grow business to any real extent.

Susan Arnold, Marketing Director at asb law says: “We wanted to be in a situation where client data was really driving business development. Simply put, we needed a system to translate client data into a powerful corporate asset, one that sits at the heart of our business development strategy.”

In 2006, Arnold looked at a number of customer relationship management (CRM) systems. She says: “They didn't integrate well with our existing systems, nor did they offer the analysis, reporting and sales tools that are fundamental to structuring the marketing and business development processes we want.”

She concludes: “We looked for a system that provided everyone within the firm—from support staff to department heads—with a comprehensive, single client view that could underpin all client contact. It also had to be able to deliver sales pipeline management tools and the means to identify cross-selling opportunities within the existing client base via service gap analysis.”

Solution

When Arnold looked beyond the traditional CRM systems for law firms, she contacted Aspective, a Vodafone company and leading provider of Microsoft Dynamics CRM technology. Despite the technology being new to the legal industry, it delivered the kind of tools asb law wanted. What's more, Aspective provided the expertise that convinced Arnold and her colleagues.

"Aspective was willing to invest the time in understanding our business and what we needed from a CRM solution," comments Arnold.

The new solution represented a major change in day-to-day processes at asb law. Arnold says: "As

such, user adoption depended on embedding the client engagement process deeply into CRM. We wanted a single interface supplying data on all aspects of client management and development."

She continues: "We consulted with personnel across the firm in terms of design and testing the system to ensure it met our operational requirements. We gathered lots of feedback from test scenarios and, with input from Aspective, ran half day training sessions and created a user guide. Added to this, we created expert users across the business to answer initial queries when the system launched."

In June 2007, the new CRM solution went live. The finished infrastructure included Microsoft

Dynamics CRM 3.0 connected to a Microsoft SQL Server 2005 database. Employees use Microsoft Office as the operating system.

The firm will start using the CRM system's sales and marketing tools in 2008. Still, with all its additional data fields, the technology delivers a lot more information on existing client relationships. And from this, employees can complete service gap analysis easily.

Importantly, the new system also gives greater support when taking on new clients. This is because it provides a direct link to Experian, a major identity and credit-checking agency, so staff see instantly whether to pursue new potential clients.

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Business benefits

"Aspective has given us a solution that allows employees to see business opportunities instantly," says Arnold. "And looking ahead, staff will use the tools in CRM to market sell more services to clients. Just having an instant picture on who's been invited to which business event, who's attending, and what marketing collateral they've received will be incredibly useful in growing the business."

- Employees have a detailed view of client information in a single location, so they can focus more on working directly with clients.
- Partners see business opportunities instantly because of service gap analysis tools.
- Employees can use the tools available in the CRM system to market and sell new services to clients in a structured way.
- A familiar Microsoft Office interface has increased speed of adoption among staff.
- asb law can start work for new clients quicker because a direct link from the CRM system to Experian has automated processes required to satisfy new money laundering regulations.

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