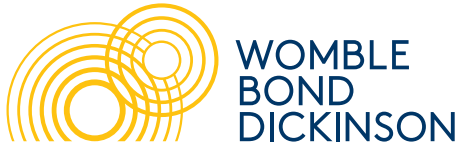


CASE STUDY



Womble Bond Dickinson (US) implement right-sized CRM for more effective lead generation

Womble Bond Dickinson (WBD) is an Am Law Top-100 law firm with offices across the US. It pushed 'pause' on a firm-wide CRM rollout just as Covid hit and used the time prudently to synthesize its CRM data and reassess its marketing and business development needs. After realigning its CRM strategy, it asked Wilson Allen to help deploy a CRM built on Salesforce to better meet the firm's current and future needs.

As a result, the firm now has a flexible CRM solution tightly integrated with other essential business development tools. It is using the platform to push ahead with further innovative data integrity enhancements.

Pivoting to a better model

In late 2019, Drew Hawkins, Director of Digital Marketing at WBD, says the firm had decided to move away from its previous CRM to Salesforce. Having previously planned a deployment to all attorneys prior to the pandemic, the firm reconsidered its options and began exploring a much more limited rollout.

Hawkins describes it as an inflexion point. He and his team talked to partners and other attorneys to find what problems they needed to solve around contact gathering, client reporting and business development needs.

A portrait of Drew Hawkins, a man with glasses and a beard, wearing a blue and white plaid shirt, smiling.

“Wilson Allen helped us to develop a CRM that is accurate, clutter-free, and up-to-date, enabling us to extract key information and act on it easily.”

Drew Hawkins - Director of Digital Marketing, Womble Bond Dickinson (US) LLP

The answer was enlightening because the majority spoken to did not want to add another system to their working day. “Most attorneys weren't inputting data and would go to their client development team to run reports,” says Hawkins.

“That gave us food for thought. It quickly became clear that rolling out CRM to everyone wouldn't be an efficient use of resources. Rather than improving CRM activity, it might be detrimental if attorneys were not prepared to embrace it entirely.”

Making data fit for purpose

With this in mind, WBD decided to rationalize its CRM landscape, transitioning to Upper Sigma, a version of the Salesforce CRM designed for law firms and a smaller 35-user footprint. Hawkins says it made sense from a user perspective.

“Salesforce is very flexible. It can plug and play with a lot of different platforms and doesn't lock you into a certain suite of solutions, which is something that differentiates it from some of the more legal-focused CRM applications.”

At this stage, WBD called Wilson Allen to help the firm deploy a streamlined, fit-for-purpose instance of the Salesforce application.

“Wilson Allen helped us ‘Marie Kondo’ all the fields in our CRM, making it easier to extract actionable information,” says Hawkins.

WBD and Wilson Allen went through key Salesforce objects and reports and eliminated any data fields that weren’t adding value.

“We cleaned up the user experience and ended up with a very streamlined iteration of Salesforce. We consciously stripped it back, knowing we could add fields back as and when our business development needs demanded.”

B2B marketing done right

Hawkins emphasizes that one of the most valuable inputs provided by Wilson Allen was their ability to walk WBD through a typical legal sales process, particularly with regard to the ‘lead to contact’ relationship.

“They understand how to apply B2B marketing and business development practices to the legal industry,” he says. “Tracking leads correctly is essential for effective business development. We now have good rules around how we decide to group leads and contacts. In addition, Salesforce offers deeper granularity with contacts, adding focus and accuracy to our business development campaigns.”

Hawkins says rolling out a solution for capturing contacts has greatly increased the CRM’s number of high-value contacts. “Getting quality contact information into the CRM is a huge challenge, and

“Wilson Allen understands how to apply B2B marketing and business development practices to the legal industry.”

Drew Hawkins - Director of Digital Marketing,
Womble Bond Dickinson (US) LLP

gathering information from email traffic is an important part of the connective tissue between partners and CRM data.”

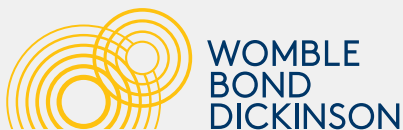
One score to rule them all

Hawkins talks enthusiastically about an algorithm Wilson Allen is helping develop that uncovers the firm’s overall engagement with a contact.

“It is a “one score to rule them all” analysis that combines email data and feedback about a contact’s engagement with WBD’s marketing activities. It also assigns them an opportunity measure as to whether they are a short, medium or long-term possibility.”

Hawkins says the slimmed-down approach to CRM has proven successful.

“The firm is getting critical data into the CRM without attorneys having to learn a new platform. The business development team has a much more refined database without unnecessary contacts being pulled in. As a result, we have more valuable information at our fingertips to qualify leads accurately.”



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