Law Firm CRM Development and Maintenance

ESQUISITE MARKETING, LLC

What is CRM? It is a tool that attorneys, and even some marketing departments, never use to its full capability. CRM stand for Client Relationship Manager. Most CRM systems are built to ensure that the right clients, contacts, and/or prospects, receive firm communications at the appropriate time. Most small firms have something that they call a "marketing list."

If your marketing list is a list of names and email addresses and/or physical addresses, you have taken the appropriate first step. Congratulations!

If you do not have the list categorized by client, referral, or prospect, you need help.

If you have not further categorized these groups into their respective industries, and the practice areas they are interested in receiving information about, you need help.

If you have not tracked what items were sent to these people, if mail was returned or emails bounced back or unsubscribed, you need help.

If you are not tracking how much marketing money you have spent on them – dinners, tickets, golf outings, etc., - when those events were, and when you will connect with them next, you need help.

If, for each client, you are not tracking their kids and spouse's names, or cross-selling opportunities, you need help.

If, for each referral source, you are not collecting info on who they referred and the amount you billed those clients, and whether you sent the referral a thank you note or gift, you need help.

If, for each prospect, you are not tracking what event you will connect with them at, how you are going to get in front of them, etc., you need help.

A wise man once said, "garbage in, garbage out." This age-old adage applies to your CRM, for it is only as good as what you put into it. Let ESQuisite help you make your list of contacts a valuable tool to manage your business development and marketing efforts.