

THOMSON REUTERS ELITE CASE STUDY

MINTZ LEVIN

FIRM OPTIMIZES CRITICAL CONTACT RELATIONSHIP DATA
WITH BUSINESS DEVELOPMENT PREMIER

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SEAMLESSLY INTEGRATING CONTACT RELATIONSHIP MANAGEMENT

Mintz Levin is a general practice, full-service firm with over 500 attorneys. Headquartered in Boston, the firm also has offices in Los Angeles, New York, San Diego, San Francisco, Stamford, CT, Washington, D.C., and a liaison office in Israel.

The firm has made it a priority to strengthen the way contact relationship data is accessed and maintained in order to enhance its business development efforts.

In the past, the firm's business development team had been utilizing several different databases and spreadsheets to maintain contact information, experience, new business opportunities, referral sources and company profile information. Wanting to improve efficiency, the firm's Chief Marketing Officer, Amy Fowler, identified a significant advantage to be gained from Thomson Reuters new customer relationship management (CRM) technology.

Business Development Premier is a business development solution designed specifically for law firms. Built on the best-of-breed Microsoft™ Dynamics® platform, Business Development Premier is a CRM solution coupled with enterprise relationship management (ERM) technology, enhanced with marketing automation, experience management tools, company profiles powered by Thomson Reuters and competitive intelligence through integration with Monitor Suite.

"After investing a great deal of time, money, and energy into a home-grown system that did not provide the kind of seamless integration or comprehensive view of our client relationships we needed, we were thrilled to learn about Business Development Premier," states Fowler. "It offers what I had always envisioned a CRM system should be able to do."

Business Development Premier seamlessly integrates with other Elite solutions, including 3E® which the existing Enterprise™ client is planning to transition to in the future. This was another driving force behind Fowler's decision to participate in the solution's Beta program.

"We were confident that BDP would be a reliable investment because Thomson Reuters owned all of the core products (ContactNet, TR Company Profile, and Elite) that would be combined into the BDP platform" Fowler explains. "We trusted Elite's ability to integrate the solutions so they would work together as seamlessly as possible."

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Amy Fowler
Chief Marketing Officer

COLLABORATING WITH A SUPPORTIVE TEAM

Fowler and her team decided to participate in the Business Development Premier Beta program after deploying a system that did not meet the firm's needs or requirements. They were impressed with the solution, as well as the implementation team, and decided to move forward with the full deployment of Business Development.

"As they were developing the product, the support team would ask us to test and offer ideas about improving functionality and intuitiveness," describes Fowler. "They not only delivered on everything we had been promised, but also incorporated the vast majority of our suggestions into the final product."

MINTZ, LEVIN, COHN, FERRIS, GLOVSKY, AND POPEO P.C.

Mintz Levin is a full-service, general practice law firm with more than 500 lawyers, eight offices in the United States and the United Kingdom, and a liaison office in Israel.

BUSINESS CHALLENGES

The firm needed a reliable solution to collect, store, and update crucial client relationship data, which also integrated into its core technology platforms.

WHY BUSINESS DEVELOPMENT PREMIER?

Business Development Premier is a powerful new integrated platform designed to transform client relationship management and business development for firms.

BENEFITS

- Seamlessly integrates with core Elite technology
- Centrally stores and consolidates customer relationship data without compromising lawyers' personal contact lists
- Compatible with Microsoft™ Outlook® and mobile devices
- Access to broad and narrow company information and relationship history

Working with such a reliable team was an essential component of a successful implementation. Fowler anticipated that the deployment would be a considerable undertaking, and it was important that it was completed both on time and on budget. With the support of a seasoned project manager that the firm retained, Mintz Levin was able to collaborate with the BDP implementation team to keep the project on track and resolve issues as they emerged.

"We have been very satisfied with the support we have received from the Business Development Premier team," states Fowler. "They are there for us when we need help."

"Business Development Premier enables our business development team to have all of the relevant information about our clients and prospects in one place. Everything we need to know is right there. It is a big time saver and, more importantly, a far more comprehensive and holistic view of our full relationship with clients."

Amy Fowler

ONE-STOP SHOP FOR RELATIONSHIP INTELLIGENCE

For Mintz Levin, the beauty of BDP is that it provides a centralized location for the firm's contacts and relationships that exist across those contacts. In addition, it houses all of the firm's experience records, sales opportunities (pitches and rfps), inbound and outbound referral sources, and company profile information for clients and prospects. "Now that we are centrally storing the entirety of the firm's experience, pitches, and referrals in the database, we can easily create meaningful reports for management," states Fowler.

Business Development Premier automatically uncovers client data from address books, email traffic patterns, calendars, and CRM data, with no manual entry required. The solution sorts and merges aggregated data, so it is ready to use and report on without changing lawyers' personally stored contacts in Microsoft Outlook®.

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Amy Fowler

Fowler explains, "As Business Development Premier centralizes the entirety of our firm's CRM data, it is crucial to our lawyers that the solution doesn't compromise the integrity of their individual contact lists. Our team is thrilled about this unique capability because most other CRM solutions force contact updates to be reflected universally."

DETAILED CONTACT INFORMATION AT ANY LEVEL

Business Development Premier equips the firm's business development team with general and detailed data about its existing relationships, ranging from a company's financial information and recent press coverage, to a full log of history with a specific contact. For example, in an instant, Fowler and her team can see if a particular company has been a client of the firm, the person who established the relationship, the matters associated with the company, and much more. In addition, it enables notes and activities to be added to each contact entry, making it easy for the firm to maintain an up-to-date log of the history with that company or clients. "We can more accurately update the information that is important for identifying our clients and prospects, expanding existing relationships, and following up on new opportunities," Fowler explains.

"Business Development Premier enables our business development team to have all of the relevant information about our clients and prospects in one place. Everything we need to know is right there. It is a big time saver and, more importantly, a far more comprehensive and holistic view of our full relationship with clients," Fowler explains.

In the future, Fowler looks forward to rolling out the mobile functionality of Business Development Premier, which will provide a significant advantage by equipping users with quick access to the information they need while on the go.

For more information about Business Development Premier, please call **+1 800 977 6529** or visit **businessdevelopment.elite.com**.

