

THOMSON REUTERS ELITE CASE STUDY
ARNALL GOLDEN
GREGORY LLP

TEAMING WITH THOMSON REUTERS ELITE FOR ADVANCED
ENTERPRISE RELATIONSHIP MANAGEMENT SOLUTIONS



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INVESTING IN MARKETING WITH A TRUSTED TECHNOLOGY PARTNER

Arnall Golden Gregory LLP (AGG) has been committed to providing creative solutions to help its clients succeed for the past 63 years. Ranked as one of the top 300 firms by the National Law Journal, AGG measures its commitment to meeting and exceeding expectations by the success of its clients.

In 2010, the firm expanded from Atlanta, opening offices in Washington, D.C. and Miami. With this expansion came a focus on enhancing marketing resources and infrastructure, and, according to Director of Marketing Clinton Gary, "The first step was to lay a foundation with reliable technology."

To build that foundation, Gary saw it necessary to implement a customer relationship management (CRM) solution to better manage existing and potential client relationships. Although the firm had a CRM solution in place, Gary considered it to be incompatible in achieving the marketing department's objectives. He explains, "The existing solution was very complex and expensive and it offered more than what we needed. Because information was maintained in a very inefficient manner, we were put at an increased risk of inaccurate data."

Moving forward, Gary conducted a five-year cost analysis across multiple solutions. Thomson Reuters Elite's Business Development Solution suite stood out from competitive solutions because it provides integrated CRM and enterprise relationship management (ERM) solutions, which takes CRM one step further. Firms gain a unique advantage with ERM because it maximizes the potential of each relationship by showing not only who at our firm knows a contact but also who else do we know in the contact's company and in the contact's industry.

Most importantly, it indicates who knows whom the best, creating an efficient way to quickly facilitate internal knowledge sharing and determine the best course of action. Gary says "an ERM system breaks down old inefficient methods of collaboration through hallway

conversation, which are limited by proximity, or firm-wide emails that were never universally read and responses never saved.

Gary was also attracted to the Thomson Reuters Elite solutions because Contact Manager® CRM and ContactNet® ERM are built upon a centralized database, providing the firm with an additional advantage.

Contact Manager is a fully-integrated CRM solution designed to increase efficiency in marketing and business development departments. It provides a centralized, comprehensive view of firm contacts and relationships gathered across dispersed data sources. It automatically captures firm contact and relationship data to reduce the ongoing effort associated with contact data capture and ensures that data is accurate and current.

ContactNet is the market's first and most robust ERM solution that automatically identifies, deduplicates, and classifies relationship data across an organization. ContactNet provides access to comprehensive relationship intelligence with no additional data entry or maintenance to assist with key initiatives. These include annual business planning, developing and retaining clients, prioritizing target clients, responding to RFPs, cross-selling, and more.

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Clinton Gary
Director of Marketing

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Arnall Golden Gregory LLP is a law firm in Atlanta, Miami, and Washington D.C. that serves the business needs of growing public and private companies. Through mergers and acquisitions, capital markets financing, strategic alliances, joint ventures, regulatory compliance, litigation, and other business-related guidance, the firm helps clients across a broad range of industries turn legal challenges into business opportunities.

CHALLENGE

The firm needed stable solutions to manage the redeveloped marketing department.

WHY CONTACTNET AND CONTACT MANAGER?

ContactNet® is the first and most robust enterprise relationship management (ERM) solution to easily leverage existing relationships and discover new ones. Contact Manager® is a fully integrated customer relationship management (CRM) solution that combines contact and list management with email marketing and Web site integration for campaign planning and management.

BENEFITS

- Increased efficiency with integrated CRM and ERM solutions
- More than doubled the number of existing contacts automatically
- Created more ways of identifying relationships for business development and event planning
- Backed by a trusted provider for long-term success

“Thomson Reuters Elite offers a cost-effective business development solution that is already integrated with an email product,” says Gary. He elaborates, “No other vendor offered a similar out-of-the-box integration to ContactNet’s integration with Contact Manager. The greatest value is the connectivity of both of those solutions from a single provider.”

The dual, Web-based solutions also met additional key criteria for the firm, including third-party hosting and maintenance. “From a tactical standpoint, it made the most sense to have solutions that were not only Web-based, but were also integrated and provided by a single vendor I know I can trust. This decision reduced implementation risk and improved my ability to get the most value out of my investment,” he continues.

“Eliminating that role has freed us to spend more time training others to use the solution, searching for higher value connections, and making email lists even more robust. This ultimately provides more value for the attorneys and our clients, which is key to our continued growth.”

Clinton Gary

PREFERRED FUNCTIONALITY ACROSS THE FIRM

Gary chose to implement ContactNet first because he thought it would be the best way to introduce Thomson Reuters Elite to the firm. “I pitched to the executives that ContactNet was going to be a quick and easy implementation, and it was. I planned to work with Thomson Reuters Elite on future projects, and by creating such a strong first impression, the company gained my firm’s confidence.”

ContactNet keeps contacts up-to-date and consistent without any duplicate information. For each individual contact, ContactNet accumulates all pertaining contact information from staff records into one accurate entry. This leverages the strength of a collective network across the firm.

After only six months of using ContactNet, the marketing department was able to nearly triple its contact database with access to more than 300,000 contacts. This was a significant upturn from the complex nature of the previous

solution that only allowed Gary and his team to utilize a small percent of its capabilities. Before ContactNet, only 15 percent of the firm’s contacts were connected to email lists, which Gary considered to “constrain our marketing department’s ability to help our attorneys deliver value to our clients”

Gary was not only impressed by the massive increase ContactNet provided, but also by how contacts were produced automatically with no effort at his end. “What I appreciate most about ContactNet is that it is a self-propelling solution that provides the benefits we need with zero percent of the effort,” he says.

Prior to this implementation, a member of Gary’s team was primarily responsible for manually managing the firm’s contact database. Now that data collection is automatic, that staff member is able to drive additional value towards marketing efforts.

“Eliminating that role has freed us to spend more time training others to use the solution, searching for higher value connections, and making email lists even more robust,” Gary adds. “Search and social networking platforms, such as Google and LinkedIn, and the connectivity they empower are becoming more engrained in our culture. With ContactNet, we are leveraging a similar social technology to incorporate those benefits into a business environment. This ultimately provides more value for the attorneys and our clients, which is key to our continued growth,”

“The traditional CRM model is all about one contact that, in reality, is only one version of the truth,” says Gary. “In this scenario, attorneys have their contact information overridden by the information that marketing maintains. However, when ContactNet pulls in contact information from attorneys’ desktops, no changes are made to their individual records. Our attorneys appreciate this because they are able to access the firm’s records from a centralized database, without losing their ability to update their personal records with the most recent information.

MAXIMIZING MARKETING EFFORTS

Since implementing ContactNet and Contact Manager, “our universe has been expanded, and our marketing investment has improved,” says Gary. “We have increased our efficiency in the department with ContactNet being the forward-facing tool and Contact Manager as the behind-the-scenes tool. Rather than having to export, save, and upload spreadsheets into Contact Manager, we are able to simply leverage those contacts in ContactNet to send communications via Contact Manager in a very efficient manner. The two solutions work as pairs that are integrated seamlessly to provide tremendous benefit.”

“Our lawyers have had many successful conversations simply because of warm introductions. It’s this type of activity made possible by ContactNet that has dramatically improved our collaborative client development initiatives.”

Clinton Gary

Added Value from a Growing Database

ContactNet consistently produces more points of connection to the firm’s already expanded “collective repository of relationships.” Gary says that more than 50 ContactNet searches performed on a monthly basis, which results in “600 connections a year that might not have been made otherwise. This is extremely beneficial, especially across our newly expanded office locations,” he adds.

Gary and his team also use the solution to sort that information within the database. “We use Legal Alerts to immediately send information that is time sensitive and critical to the success of our clients. We target them to different market segments, like HR for example, so we can simply run a search in ContactNet to generated contacts that work in HR at the executive level. This feature enhances our ability to manage marketing initiatives within Contact Manager by identifying those who are more likely to find value in our firm’s publications.” He continues, “Executives can be overwhelmed with email messages, so it is paramount that our team only delivers relevant and timely information. This sets us apart from other firms, and our clients appreciate our consideration.”

Greater Success in Business Development

Attorneys have found ContactNet as a powerful tool to identify potential new business. As opposed to cold calling prospective clients, Gary and his team run searches in ContactNet to find mutual acquaintances that can set up introductions. This allows attorneys to meet potential clients on a more personal level. “Our lawyers have had many successful conversations simply because of warm introductions,” says Gary. “It’s this type of activity made possible by ContactNet that has dramatically improved our collaborative client development initiatives.”

Increased Awareness of Industry Events

Previously, the firm was relying on word-of-mouth to generate buzz about firm-sponsored events. This tactic would typically result in “tables and rooms filled with more attorneys than clients.” He adds, “It’s easy for invitations to

be overlooked, but because ContactNet is used to search for specific geographic, industry, title and requirements, more appropriate contacts are generated with stronger relationships with the firm.

“For a recent event, ContactNet generated 200 appropriate contacts. This enabled our team to personally reach out to attorneys to qualify their relationships and promote the benefits of the event to their clients. Ultimately, it helped us increase our ROI by populating the event with our most appropriate clients and prospects.”

In-depth Relationship Insight

“Thomson Reuters Elite has been doing a great job at adding enhancements on a frequent basis,” says Gary in appreciation of the upgrades that ContactNet has introduced since implementation. ContactNet now provides more in-depth algorithms used to determine relationship strength, “which is an incredible way of scoring relationships.” Additionally, ContactNet has the functionality to send Gary email alerts when new relationships with organizations are formed. “It’s a great way to keep me in the flow of our client development efforts and guide me in formulating new marketing initiatives to help my attorneys strengthen relationships,” he explains.

“The value with Thomson Reuters Elite is that the technology is backed by an organization that I know has layers of quality people. I feel as though I’m making a decision for the stewardship of my firm.”

Clinton Gary

ALIGNING WITH COMPANY VALUES

According to Gary, the AGG brand is a balance of creativity and practicality. “We promote the concept of ‘business sensibility,’ and the Business Development Solutions from Thomson Reuters Elite embody that same concept. Thomson Reuters Elite has created appropriate solutions that can be molded to fit our needs and seamlessly connect with one another, creating significant efficiencies and fostering entrepreneurialism, collaboration, and great client service, hallmarks of our brand and culture. This has made it comfortable for us to align with Thomson Reuters Elite.”

Gary describes how it is important to have industry-leading technologies backed by a quality vendor that he can rely on to serve the firm’s current and diverse needs over a significant period of time. “The value with Thomson Reuters Elite is that the technology is backed by an organization that

I know has layers of quality people. If my main contact is promoted or leaves the company, I know that there will be someone just as knowledgeable to step in. I feel as though I'm making a decision for the stewardship of my firm."

Gary also appreciates how working with a trusted team helps the firm avoid cost and complexity with current and future solutions. "I want to be able to trust my provider to raise a red flag if I start looking into functionality that is outside of my firm's comfort zone, and there have been so many times when Thomson Reuters Elite has done that. A solution might appear to be a great fit, but I know I can trust my vendor to inform me of potential threats that could come later down the line. That is the mantra throughout all the projects that we do with Elite."

He continues, "I have worked with Elite for several years now, and I cannot overestimate the value of having a vendor that understands my team's objectives. Equally as important is its understanding of the nuances of the legal industry, providing my firm with a forward-thinking approach. Elite continually meets my criteria of best practices, so I know I am serving my firm well."

For more information about ContactNet and Contact Manager, please call **+1 312 873 6881** or visit www.elite.com/businessdevelopment.

