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Marketing Technology Best Practices

from Leading Legal Marketing Teams

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Many law firms recognize the fundamentals for success in marketing technology, including:

- determining an overall vision and strategy
- improving the quality of marketing data
- standardizing processes
- realizing value from previously committed investments

Fewer firms have made the investment to co-ordinate the interlocking parts of their marketing technology stacks to operate as efficiently as possible. Only a very few leading firms have successfully aligned their marketing technology, processes, people and data to drive business results.

What do these leading firms look like?

On the following pages, we have compiled a list of best practices for marketing technology that are employed by leading law firms. We have arrayed these practices in 16 categories, ranging from tactical (CRM data quality) to strategic (Business Planning and Account-Based Marketing).

In our experience, no single firm has mastered all aspects of marketing technology.

Nevertheless, firms that aspire to market leadership are making substantial headway in aligning their marketing technology investments with their business goals.

Empowering the Legal Industry's Best Business Teams

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Capability	Leading Practices
CRM: Data Quality	▪ Advanced automated duplicate checking and resolution. ▪ Standardized connectors for various data feeds (e,g, Pitchbook, Dun & Bradstreet, BoardEx) to enrich contact and company data. ▪ Automatic rules-based harvesting of contacts and interactions (Enterprise Relationship Management), enriching contact data and eliminating need for data entry. ▪ Integration of newsfeeds and social media presence/trending topics into company and contact records.
CRM Data: Access and Insight	▪ Single unified view of client and prospect data in one system. ▪ Integration of financial data, matters, newsfeeds and social media presence and trending topics into company and contact records. ▪ Automated alerts and notifications to attorneys regarding changes in client/prospect status, news, etc.
List Management and Segmentation	▪ Trend away from static marketing lists to active segmentation tools — allowing generation of dynamic lists. ▪ Increasing sophistication and ease of use; segmentation based on user behavior and customer journey as well as demographics; application of artificial intelligence and predictive modelling. ▪ Reduced load on lawyers through interactive list notifications where they see only their own contacts and can check them off.
Marketing/BD Planning	▪ Marketing plans with accountabilities and rewards for individual lawyers, client teams, practice groups, industry groups. ▪ Planning and implementation technology-enabled through software.
Account-Based Marketing (ABM)	▪ Single view of all account data, including base company data, current research, key contacts, board members, opportunities and marketing touchpoints. ▪ A flexible structure and framework to import and record outcomes of the planning process and to align to changing visions on reporting angles. ▪ Functionality to report/dashboard on account planning data.

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Marketing Automation	▪ Fully integrated campaign solutions across multiple channels and platforms: email, web, events, print and in-person. ▪ Triggered multi-step campaigns — build campaign flow and execute automatically. ▪ Campaign personalization to have emails appear to come from individual attorneys.
Lead and Opportunity Management	▪ Opportunity data enriched through integration with contacts and activities. ▪ In organizations with advanced sales culture and infrastructure, marketing-qualified leads are actively followed up by BD.
Client Satisfaction Measurement	▪ "Voice of the Client" data and metrics integrated with CRM. ▪ Surveys/interviews cover a sizable portion of client base each year. ▪ Use of Net Promoter Score or another recognized client satisfaction metric.
Measurement, Analytics and Reporting	▪ Real time dashboard reporting with analytics and visualizations. ▪ Enrich reporting through connection to external data sources. ▪ Connectivity between web/social analytics and CRM analytics.
Creative Development	▪ In-house and/or agency-led digital capabilities with the ability to create content for multiple digital platforms. ▪ Collateral on demand solutions that do not require a designer.
Adoption, Training and Change Management	▪ Accessible on-demand libraries of end-user training for CRM and martech. ▪ Formal martech onboarding for new users. ▪ User groups to uncover and address issues.
Market and Competitive Intelligence	▪ Systems to automate production and assembly of basic research deliverables. ▪ Outsourcing/offshoring of basic research. ▪ Advanced legal intelligence databases allowing for much more granular competitive and market insights.

Capability	Leading Practices
Web and Social Properties Management	▪ Content personalization for 360-degree management of the client experience. ▪ Increasing use of video and multimedia content. ▪ Platform agnostic content and applications. ▪ Website integrated with multi-channel campaigns. ▪ Client-specific microsites with personalized, targeted content and collaboration. ▪ Full social media integration with all online content and metrics.
Attorney Experience Management	▪ Continuously maintain updated information on attorneys' expertise and experience, including matters related to particular clients. ▪ Integrate attorney experience with CRM.
Marketing Content Management	▪ Cloud-based content libraries enabling personalized content, collateral on demand. ▪ Integration of content library with email and web channels, enabling measurement of content assets' performance.
Marketing Workflow Management	▪ Formal work intake/project management/BPM systems for Marketing teams. ▪ Informal cloud-based tools for team collaboration.