



A CRM solution that improves and centralises client engagement

Key Benefits:

- Single and secure view of client information
- Centralised event management and customer lists
- Integrated with existing Microsoft technology
- Smooth data migration
- Process efficiencies for administrative staff
- Data accuracy and minimal duplication

“From the way they have approached our project, I wouldn’t hesitate to recommend Gap Consulting.”

ALISON BOWN, PROGRAMME MANAGER,
SLAUGHTER AND MAY

Slaughter and May engages Gap Consulting to build and design a CRM solution that delivers a central event management capability

Slaughter and May is a prestigious international law firm with a varied client list including leading corporations, financial institutions and governments. With offices in London, Brussels, Hong Kong and Beijing, Slaughter and May has over 1,160 employees worldwide.

The firm has an extremely loyal employee base, with many of its employees spending their whole careers with the firm, joining as trainees, becoming associates then being elected to a partnership.

Challenges

The organisation wanted to give certain areas of the business access to a CRM solution in order to enable them to become more efficient from an administrative point of view.

One particular area of the business that Slaughter and May wanted to improve was the management of their internal and external events and seminars, as well as newsletter distribution.

The challenge was that the administrative tasks and activities around managing events were not centralised within one system. With disparate information based on using Excel spreadsheets, it was difficult to ensure visibility of both legacy information and up to the minute data on the individuals being contacted.

For seamless communication and integrity of client relationships, it was imperative that individuals were contacted only with relevant information and events tailored to their needs. With the current way of working there was the potential for duplication of data and in addition data accuracy could not always be guaranteed.



“The people we’ve worked with at Gap seem very knowledgeable and proactive in finding solutions to any problems that arise and we have been very happy with the service we have received.”

ALISON BOWN, PROGRAMME MANAGER, SLAUGHTER AND MAY

The Solution

Following a procurement exercise based on scalability and cost, Slaughter and May engaged Gap Consulting to develop a Microsoft Dynamics CRM solution that would be targeted at a number of key business areas.

The firm already used Microsoft technology and as Alison Bown, Programme Manager at Slaughter and May says, “With Microsoft we knew that compatibility with other applications such as Outlook would be more straightforward than other customised systems which might result in a lag on new versions of Microsoft Office.”

In phase one Gap Consulting was engaged to deliver an event management solution specifically for the administrative staff. A series of workshops took place to identify specific needs and to allow Gap to ensure that the system was delivered in the way that Slaughter and May wanted it to work.

Alison adds, “We worked closely with Gap to put together a detailed work flow to ensure we were clear about business processes and who was going to be involved.”

The second phase involved the management of client newsletter distribution. Alison explains, “We carried out a Dynamics CRM upgrade ahead of the second phase of this project. As part of that planning, we were also upgrading to a new version of Microsoft Windows at the same time, so we dovetailed it around the project.”

This phase was more straightforward with less changes and reiterations and went very smoothly. The solution allowed staff to centrally manage

distribution lists in an extremely tailored and personal way and to quickly manage data changes. Alison comments, “Personalisation is a key element to the firm, who offer a customised service. Therefore it was important to us that we could very carefully tailor our communications according to a client’s information needs.”

Alison Brown and her team worked closely with Gap Consulting to push out the CRM capabilities for client distribution and newsletters. She comments, “I’ve known the team at Gap for a long time and communication is always straightforward. They play an instrumental role in the overall project management and particularly in the de-duplication process of the database.”

At present there are 20 limited account users and 17 that are using the full CRM licence. As a law firm there are strict codes of conduct for the usage of the system and therefore the user base is restricted to those who actually need it to do their job. This includes the business development team for event management planning, as well as the practice and information teams. The firm is starting to run more periodic client events and seminars, and for this the business development team have access to the system, as well as the legal training team. Alison adds, “We’re also looking to extend it into other sectors.”

Although the system is intuitive, some staff training was required and took place in two parts with the support of Gap. There was specific training for the staff with limited access to the system to allow data entry and for maintaining client information. Then there was a second level of staff who have full

access rights to the system, and who are involved in sending out invitations to external recipients.

The benefits

The designed event management and client distribution solution built on the Microsoft Dynamics CRM platform has provided Slaughter and May with a wide range of benefits.

Single view of client information: Staff can now dynamically manage their contacts and view all information relating to that client in one place.

Centrally updated information: Now if a client changes organisation, this is centrally recorded so that the client can continue receiving relevant information about events and newsletters.

Ability to provide dynamic real-time reports: The principle client contact has an up-to-date record of all events and individuals registered to allow staff to create tailored reporting and feedback.

Clarity of client distribution lists: One record for one client now provides all the information about all of the distributions that they receive, rather than having disparate multiple lists that the client is on.

Auditability of information: Now staff can share the information on the system and it provides a clear history and an audit trail of what has taken place.

Process efficiency: The system provides a more efficient process within the organisation of managing the client record and for sending out newsletters and event information.

Time saving: Administrative staff save time by having an at-a-glance view of a client record, and highlighting circulation and events that the client is invited to.

Summary

“The project with Gap Consulting has focused on improving the administrative processes of managing the client information within Slaughter and May. We got Gap involved early on in the process of reviewing how we should approach these business challenges and they were very good at working with us to interpret and validate how it would work using Dynamics CRM.”

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