

Do or Die: Redeploying 10-year-old LexisNexis® InterAction®

Sheppard Mullin

Overview

Location: Eleven offices located in California, Beijing, London, Brussels, New York, Washington, D.C., and Shanghai

Industry: Legal services

Customer Profile:

Sheppard Mullin was founded on the principle that the firm would succeed only if its attorneys delivered prompt, high-quality and cost-effective services. This philosophy continues to guide the firm eighty years later as their attorneys and staff serve their clients' needs each day. Today, Sheppard Mullin is one of The AmLaw 100® firms, with over 550 attorneys practicing in eleven offices.

Product Summary:

Law Firm Marketing Solutions
• LexisNexis® InterAction®

Overview

At Sheppard Mullin Richter & Hampton LLP, a law firm with 11 offices globally and approximately 1,000 users of LexisNexis® InterAction®, it was a do-or-die moment—upgrade the 10-year-old InterAction® Customer Relationship Management (CRM) solution to the current version of InterAction or “die” by staying on the legacy, unsupported 4.X version. Although the firm is progressive when it comes to deploying the latest technology, it was behind with its use of InterAction software.

Vickie Spang, chief marketing officer, worked with the firm’s executive committee, senior management and partners to obtain the support and funding needed for the upgrade. The path to completion took the InterAction team for Sheppard Mullin two painstaking years but the upgrade was completed in November 2010, and the team is now smiling again.

Here’s the story of how the InterAction team garnered consensus, fought internal resistance and was able to successfully upgrade the InterAction software.

The Problem

Since 2000, Sheppard Mullin has experienced consistent growth and office expansion; however, the firm did not keep pace with the technology and hardware upgrades for LexisNexis InterAction. Most attorneys and secretaries resisted using the CRM software since it was perceived to do more harm than good. Their e-mail accounts would freeze or contacts would be duplicated requiring significant clean-up. Marketing was equally frustrated. Simple tasks took twice as long, records were duplicated and many tasks needed to be accomplished manually. The legacy system, no longer supported by LexisNexis, was simply unable to meet the firm’s basic needs.

To Vickie, InterAction was the albatross around their necks. No one could deny the need for a CRM solution, but something had to change. The firm explored other CRM software options, but after seeing the most current InterAction version, it was determined that InterAction remained the best tool to meet the needs of the firm.

To convince the committee of the necessity to upgrade, Vickie used key business drivers to persuade them.

Planning the Upgrade

Step #1: Budget Approval

The first step in approaching the upgrade was to obtain approval and funding from the firm's executive committee. A hardware investment was necessary as well as funds to retain LexisNexis consulting services to assist with the upgrade and transition. The InterAction team was in a Catch-22, riding a vicious cycle of "if no one is using CRM software, why do we need to invest more money in it?" To convince the committee of the necessity to upgrade, Vickie used key business drivers to persuade them:

- Our business is about relationships; as a law firm we need to leverage them and stay top of mind.
- We need a reliable CRM solution so we can track our relationships and focus on what is needed to strengthen them.
- Our attorneys want CRM to leverage their connections and relationships; they're trying to install other applications instead of this one.
- Our marketing department is in desperate need of a firmwide solution.

Step #2: Tackling the Upgrade

The core team knew it had one bite at the apple. Quietly, it upgraded the InterAction back-end to comply with hardware systems requirements. The next and more challenging hurdle was to tackle the software upgrade. A firmwide announcement was made that InterAction would be upgraded. What the core team expected, it got—rolling of eyes, complaints, sighs of exasperation and negative comments.

Pulling the Launch Trigger

Of the 10 offices scheduled for the upgrade, some offices took one week, others took one month. The clock was ticking as the InterAction upgrade needed to be completed before the firm could upgrade its Microsoft® Outlook® Exchange Server, a tier-one mission-critical application. The InterAction redeployment had to be finished by November 2010.

Armed with this hard deadline, the core team knew it would have a Herculean task ahead of it—long days and weekends would be required to complete the software upgrade in time. The team drafted its nine-month rollout schedule which involved converting and training 1,000 users across 10 offices. Working closely with IT, the team planned and leveraged resources where it could, roped in computer support and choreographed the complex rollout. Based on weekly strategic planning meetings and guidance from LexisNexis® consultants, the core team put the following action steps into place:

Within 30 days of the upgrade, the firm buzz was upbeat and positive.

- It addressed a key need to have more computer support for InterAction. Prior to the upgrade, there was no ownership of CRM software, and problems were managed by the firm's data steward or marketing. Neither had the bandwidth to accommodate questions for 1,000 users once InterAction was newly deployed so after some "Train the Trainer" sessions, the computer support team stepped in to conduct training and provide first-tier InterAction support.
- To obtain firmwide buy-in, the core team created a marketing campaign surrounding the release of the "new InterAction." It elected to poke fun at the "old InterAction" by creating a video spoofing the Mac® v. PC commercials. It was shown at firm meetings and launched on the firm's intranet for everyone to view. It was a big hit. Meetings were scheduled with practice groups and partners.
- Office-by-office training was included in the plan, and sessions were designed to separately train secretaries, attorneys and administrative personnel. The training was focused on demonstrating how InterAction was seamlessly integrated with Outlook and how it could effectively manage firm relationships.
- The LexisNexis consultants assisted by trouble-shooting when needed, and even wrote scripts and code so each consecutive office upgrade experienced greater efficiency and a more streamlined process.

The Result: LexisNexis InterAction 5.6

After two years of hard work and planning, Sheppard Mullin successfully converted all of its offices to the latest version of InterAction software. Within 30 days of the upgrade, the firm buzz was upbeat and positive. Early observations included:

- "Quantum leaps better" and the "Web client is cool and easy to use."
- Via the new and easy-to-use Web client, lawyers are now able to do their own fact-finding and digging through InterAction. Attorneys traveling to other Sheppard Mullin offices check InterAction to see "who knows who" in other regions to expand upon pitches and business development opportunities.
- Secretaries now manage their attorney's InterAction contacts with greater ease.
- InterAction data synchs with financial data as well as time and billing, and provides another level of value to attorneys.
- Attorneys can access relationship maps to see "who knows who" and monitor contacts via their "watch list" while contributing to business development and practice growth.
- Firm's phone lists are easy to generate with InterAction software.

The Sheppard Mullin InterAction team is now reaping the fruits of its labor and is gratified by the positive response.

- The firm's first big project, holiday card mailings, was quickly implemented after the redeployment. Secretaries and the marketing department were delighted with the simple navigation of lists and the efficiency with which the project was completed.
- Knowledge management, marketing and the firm's computer support team continue to provide ongoing InterAction training to keep the firm excited about its new CRM possibilities.

Redeployment Perspective

The Sheppard Mullin InterAction team is now reaping the fruits of its labor and is gratified by the positive response. It continues to appreciate the new discoveries by secretaries and lawyers of what InterAction can do for the firm's business development, productivity and streamlined workflow.

Sheppard Mullin's advice to other firms contemplating an InterAction upgrade is to:

- Be flexible
- Organize, organize
- Know what other projects are in the IT queue
- Don't wait for the opportunity to come to you; control the timing
- Establish a core team to upgrade work on this project—ensure it is a cross-functional team with representatives from IT, marketing, computer support and knowledge management
- Expect hiccups along the way because that's par for the course

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