2018 MARKET-WIDE STUDY

The State of CRM at Law Firms

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Foreword
By Chris Fritsch, Founder of CLIENTSFirst Consulting

The more things change, the more they stay the same. That certainly can be said about the CRM software marketplace, if this year's report on *The State of CRM at Law Firms* is any indication.

According to a recent report from Gartner, CRM technology is now the largest and fastest-growing software market, with worldwide revenue reaching $39.5 billion in 2017. The number of law firms confirming adoption of CRM shows that the legal industry has been mirroring this increase.

Yet law firms (and, in fact, all types of organizations) continue to struggle with user adoption of CRM. The primary reasons were that the lawyers were not held accountable for using the CRM system, didn't see any value in using it, lacked the technical proficiency, or didn't have the time to use it. (Perhaps the fact that they didn't see the value or weren't held accountable was the reason they didn't spend the time, but that's a topic for another day.)

Most of these reasons had to do with human issues, not technology. This phenomenon is certainly nothing new, as the main challenges that CRM systems have faced for decades have been the people and process issues rather than the technological ones. The good news is that the technology is getting better and more automated, and firms are finding new ways to deal with these types of issues, many of which take the lawyers out of the CRM equation.

New technologies (i.e., bolt-ons or augmentation tools designed to complement or compensate for some of the shortcomings of traditional CRM systems) have finally taken hold, as evidenced by their increasing adoption rates. Enterprise Relationship Management (ERM) systems, which create new contacts from email signature blocks and use algorithms to score the strength of relationships, are becoming increasingly popular. Additionally, lawyers tend to be trained to find fault, which can hinder their adoption of a CRM filled with duplicative or dated data. Thus, more firms are appreciating the importance of data stewarding and looking for ways to handle this critical task more efficiently and effectively.

Finally, firms also seem to be making forward progress in other areas. While the pace of acceptance for cloud-based CRM systems has been glacial in the past, this year firms seem to show more openness to ascension toward the cloud. Additionally, while contact management and eMarketing continue to be the most popular CRM features reported, the use of business development technology such as pipeline management is finally sparking some interest. For most industries outside of legal, use of this type of technology has been ubiquitous for years, so adoption by law firms is a positive step toward adapting to the rapidly changing and competitive marketplace now facing the legal industry.

It remains to be seen what other interesting, positive changes are yet to come – and what will stay the same.

About Chris Fritsch
As a CRM Success Consultant and the Founder of CLIENTSFirst Consulting, Chris Fritsch helps firms select and implement the right CRM solutions to support their business development efforts, enhance adoption and maximize return on investment. Chris also writes and speaks nationally on CRM and eMarketing success. Her areas of expertise include CRM, eMarketing data quality and utilizing technology to strengthen client relationships. Chris received her law degree from Emory University School of Law in Atlanta, GA, and is a fellow of the College of Law Practice Management. Chris can be reached at 404-249-9914 or CF@CLIENTSFirstConsulting.com.

Executive Summary

In the Spring of 2018, Ackert Inc. conducted the third installment of its market-wide study on Client Relationship Management (CRM) software within law firms. This white paper is a continuation of similar studies conducted in 2015 and 2017 and is intended to examine ongoing trends in the industry. Nearly 100 law firms participated in the survey to describe the state of CRM at their firms, including:

1. Which CRM platforms are most popular
2. The changing legal CRM landscape
3. How firms of different sizes and budgets approach CRM
4. Adoption and ROI of different CRM platforms
5. Which professionals law firms task with maintaining CRM data
6. The intersection of CRM and lawyer business development (or the lack thereof)

The following pages include a detailed analysis of the survey findings as well as a list of best practices for firms wishing to choose the most effective platform, promote higher utilization among lawyers, and maximize the ROI on their CRM initiatives.

Key Findings

- The number of law firms that have CRM is growing, and they are employing a wider selection of CRMs, bolt-ons, and augmentation platforms than they have in past years. The firms that do not have CRM are mostly small firms, while virtually all large firms have CRM.
- The most-frequently-used features in legal CRM all center around contact management and email integration, but platforms with more emphasis on pipeline management have higher rates of lawyer utilization and ROI.
- The primary responsibility for maintaining CRM data falls with marketing and business development professionals. Fewer lawyers are using CRM than in past years, and firms are outsourcing more of this responsibility to external data stewards.
- At the majority of firms, fewer than 5% of lawyers use CRM for business development. The remaining majority of lawyers, for the most part, do not have any identifiable system of tracking their business development activity.
- The reasons behind low CRM utilization by lawyers include a lack of accountability, lawyers failing to understand or care about CRM's value to the firm, and lawyers not being required to use it or not having access to it.

Read the full report for more insights and explanations into our findings. We have also included a series of best practices at the end of this white paper.

Data Analysis

The data in the following analysis were compiled via a survey of legal marketing and business development professionals worldwide. Nearly 100 law firms answered questions concerning CRM utilization and ROI.

The Percentage of Firms Using CRM

The first survey question asked respondents whether their firm currently uses or has used some type of CRM system in the past. The results are displayed in Figure I.

Since 2015, the prevalence of CRM within law firms has increased steadily. 77% of law firms have CRM in 2018, compared to only 70% of firms in 2015. CRM software is increasingly being viewed as a necessity, especially at larger firms.

Figure II below elaborates on this trend; the firms that do not have CRM are mostly smaller, and CRM is more ubiquitous at larger firms.
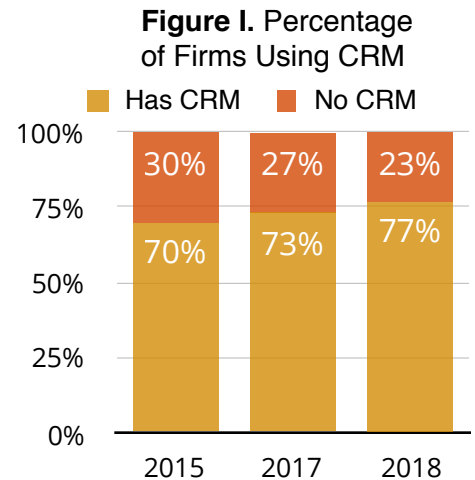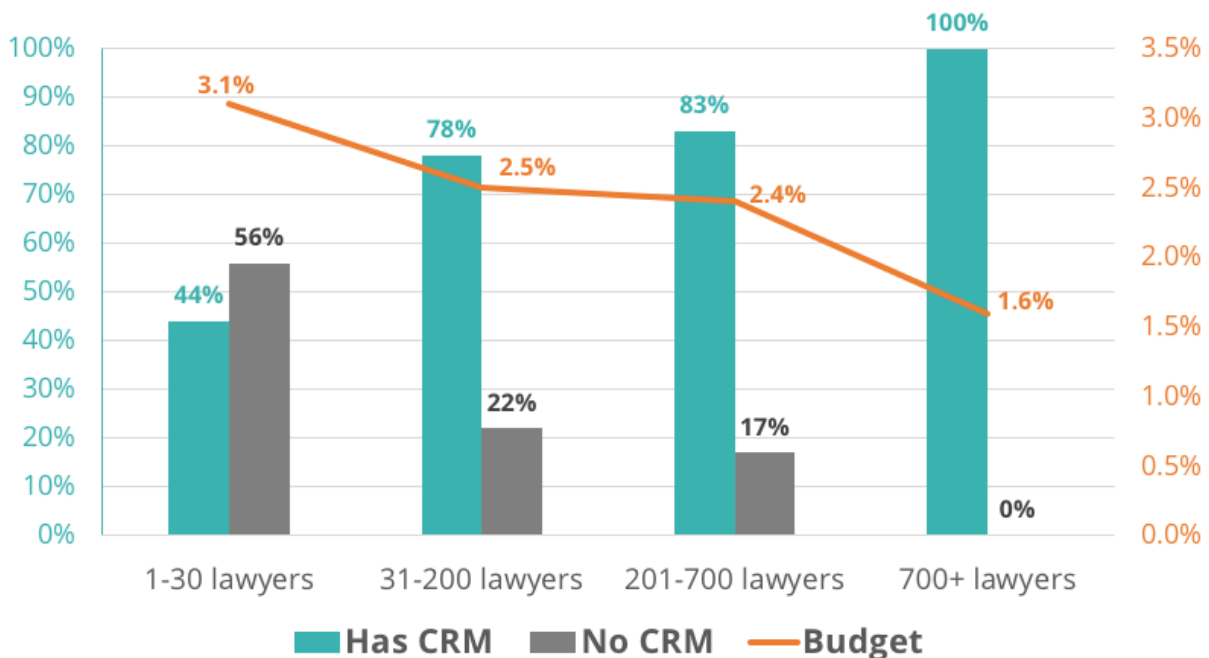

Figure I. Percentage of Firms Using CRM

Figure II. Percentage of Firms Using CRM According to Firm Size and Marketing Budget.

Interestingly, there is an inverse correlation between firm size and marketing budget as a percentage of firm revenue (excluding salaries). However, the fact that CRM use is more widespread among larger firms makes sense; the more contacts a firm has to manage, the greater the necessity for powerful tools to do so. Small firms may want to explore CRM platforms that offer a Freemium option, such as Hubspot.

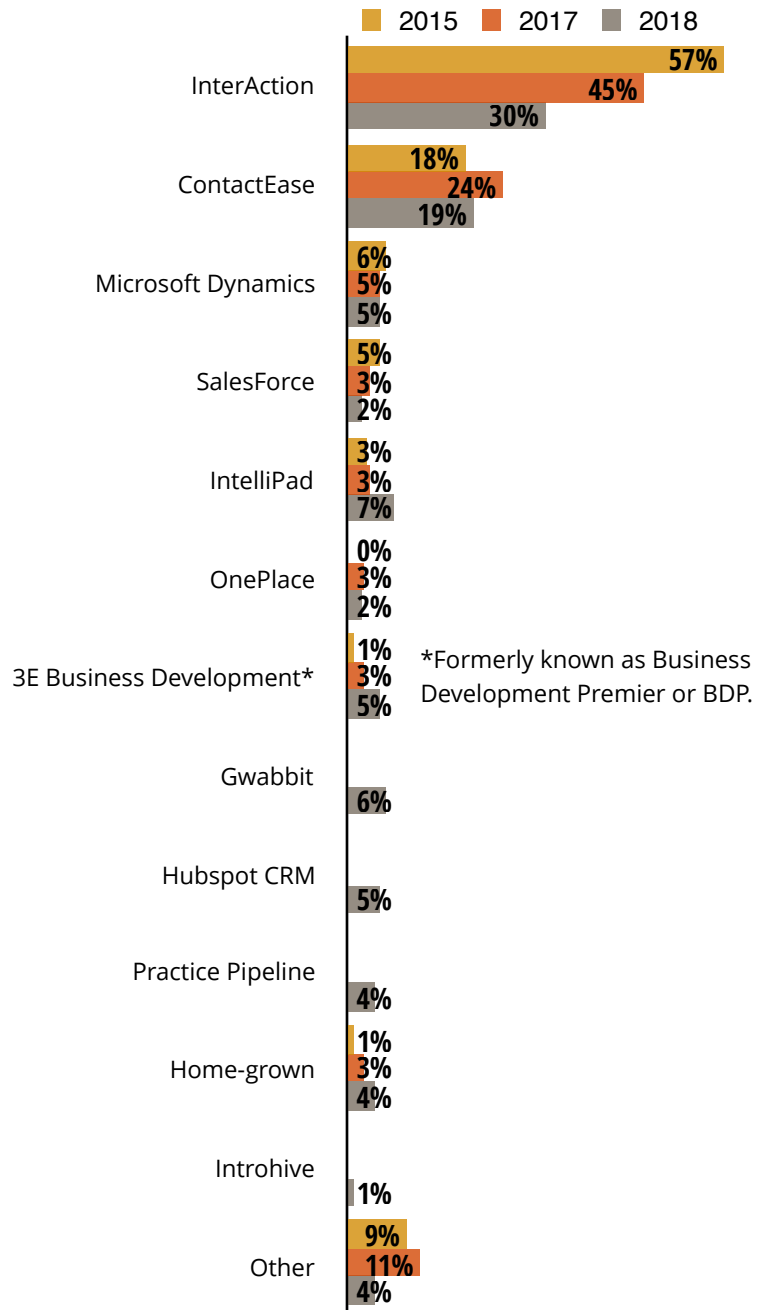## Platforms Ranked by Popularity

In past years, law firms have favored industry-specific, multi-purpose platforms. But this year, other CRM platforms, bolt-ons and augmentation tools are becoming more popular.

Figure III demonstrates this trend. Three years ago the market leader, InterAction, was in use at 57% of law firms, but that number has dropped to 30% this year. However, there are a few factors in play here. First, the legal CRM market is bigger; more law firms have CRM this year than in previous years and the proverbial "pie" is bigger. Thus, even though market leaders InterAction and ContactEase possess a smaller slice by percentage this year, that is counterweighted by a larger volume of clientele.

The legal CRM marketplace is also becoming more competitive. While InterAction and ContactEase still hold first and second place, tertiary options such as IntelliPad, 3E Business Development, Gwabbit, Hubspot, Practice Pipeline and Introhive) are now seeing an increase in their market shares. Several of these platforms were not prevalent enough to rank on the list in previous years, which is why the only year shown is 2018 (in gray).

CRM augmentation platforms and bolt-ons are often used in conjunction with CRM, so respondents were able to select multiple

Figure III. Platforms Ranked by Popularity

Legend: 2015, 2017, 2018

Platform	2015	2017	2018
InterAction	57%	45%	30%
ContactEase	18%	24%	19%
Microsoft Dynamics	6%	5%	5%
SalesForce	5%	3%	2%
IntelliPad	3%	3%	7%
OnePlace	0%	3%	2%
3E Business Development*	1%	3%	5%
Gwabbit			6%
Hubspot CRM			5%
Practice Pipeline			4%
Home-grown	1%	3%	4%
Introhive			1%
Other	9%	11%	4%

*Formerly known as Business Development Premier or BDP.

platforms in Figure III. Also note that most of the survey respondents represented firms in the 31-200 lawyer range, so platforms typically targeted toward larger firms (like Salesforce and Introhive) may not be fully represented in this survey.

2018 saw an increase in law firms building their own CRM platforms in-house (shown here as "Home-grown"). The category of "Other" consists of various platforms that, on their own, did not receive at least 1% market share. These included ProLaw, Concep, Vuture, Infusionsoft, and Legal360.

Cloud-Based vs. On-Premises

Law firms have been famously cagey about data security, insisting their data be kept on local servers despite the growing momentum of software platforms moving to the cloud. In Figure IV, we asked respondents whether their CRM platform(s) were cloud-based or on-premises. The majority (60%) of respondents said their CRM was on-premises, but a surprisingly large portion (40%) reported using cloud-based software. Though legal is lagging behind most other industries in this aspect, we suspect that law firms are adopting cloud-based technology much more willingly than they have in past years.
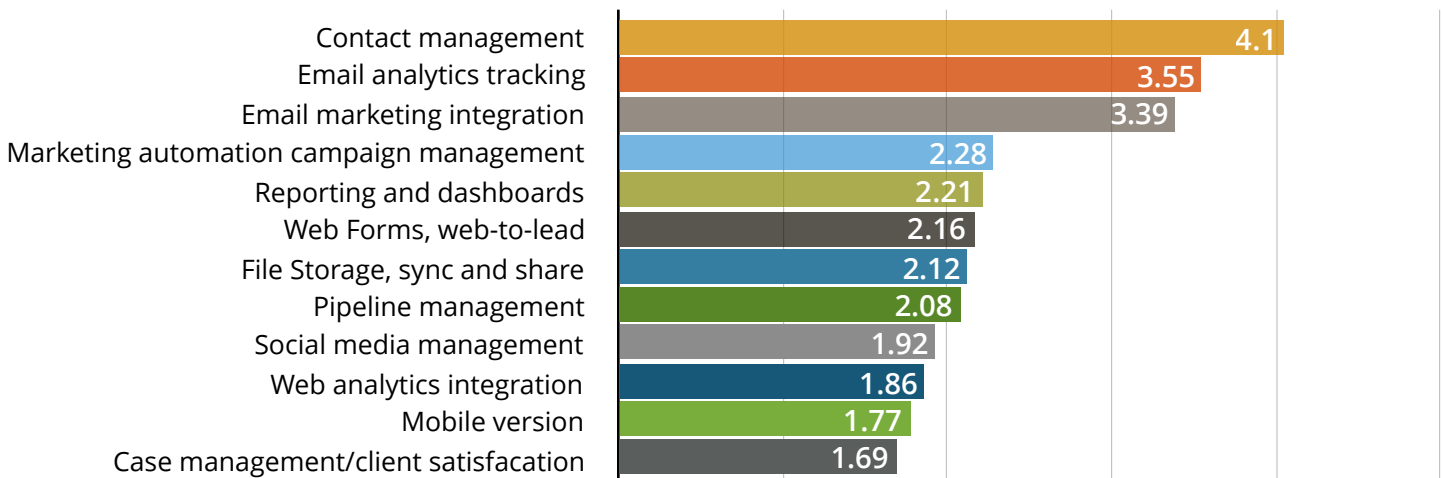
Figure IV. Cloud-based vs. On-premises

Cloud-based 40%
On-premises 60%
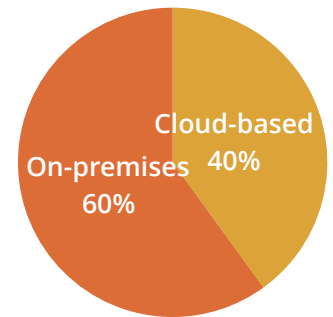
Key Features

CRM platforms are often robust and have many capabilities, but some features are more important to law firms than others. Participants rated a list of features on a scale of one to five, with one being "hardly ever," and five being "frequently." The average ratings for each feature are listed below in Figure V.

Figure V. Features Most Frequently Used in Law Firms

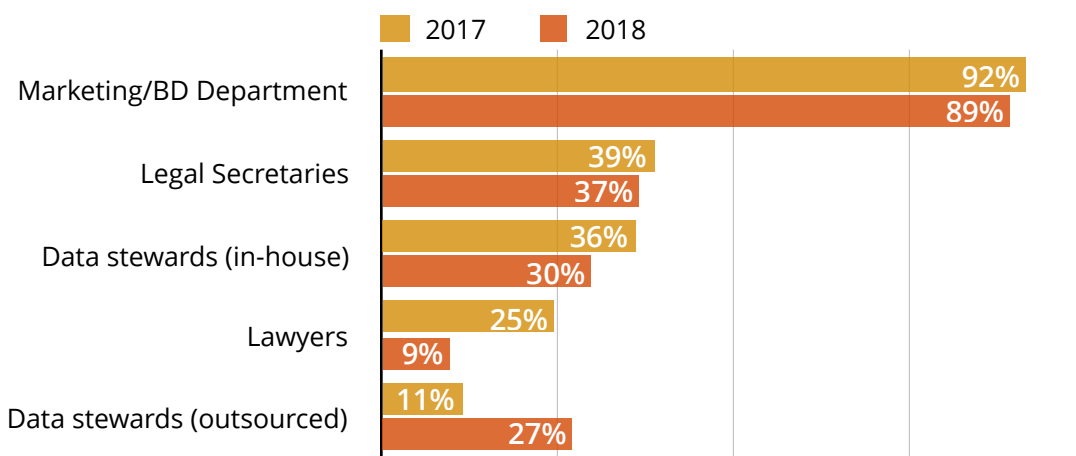| Feature	Rating
Contact management	4.1
Email analytics tracking	3.55
Email marketing integration	3.39
Marketing automation campaign management	2.28
Reporting and dashboards	2.21
Web Forms, web-to-lead	2.16
File Storage, sync and share	2.12
Pipeline management	2.08
Social media management	1.92
Web analytics integration	1.86
Mobile version	1.77
Case management/client satisfaction	1.69

Only three features stood out as being frequently leveraged within law firms. They are as follows.

- **Contact management:** Organizes client and prospect data in a centralized location. Contact details, demographics, transactions, and other contact data are saved and retrieved.
- **Email analytics tracking:** Tracks email analytics such as open rate, click-through rate, and bounce rate, usually pulling data from popular email clients like Gmail and Outlook.
- **Email marketing integration:** CRM integrates with a dedicated email marketing platform (e.g., MailChimp, Constant Contact), enabling users to send email blasts from within the CRM.

It makes sense that these three capabilities are the most-frequently-used features of CRM, bolt-ons and augmentation platforms. Email is one of the primary channels for one-to-many marketing, and it is also one of the only technology platforms that lawyers consistently use. Figure V demonstrates that law firms are not using CRM effectively for one-to-one business development activities like lead capture using web forms or pipeline management.

Figure VI. Who is Responsible for Maintaining CRM Data?

Legend: 2017, 2018

| Category	2017	2018
Marketing/BD Department	92%	89%
Legal Secretaries	39%	37%
Data stewards (in-house)	36%	30%
Lawyers	25%	9%
Data stewards (outsourced)	11%	27%

The primary responsibility for maintaining CRM data falls with marketing and business development professionals. However, there was a marked shift from 2017 to 2018 in the amount of responsibility placed on lawyers and external data stewards to maintain CRM data. The percentage of lawyers who are expected to interface with CRM dropped by 16%, while the percentage of outsourced data stewards increased by 16%. The number of firms relying on in-house data stewards also dropped by 6%, suggesting that as more firms adopt CRM and refine existing strategies, they are resorting to the most cost-effective and convenient means possible for the Sisyphean task of maintaining data.

Utilization of CRM by Lawyers

As evident in Figure VII, only a small percentage of lawyers use CRM to track business development opportunities or activities. In Figure VII below, we asked survey respondents to estimate the percentage of their firm's lawyers who utilize CRM for client pursuit.

Figure VII. Percentage of Lawyers Who Use CRM for Business Development
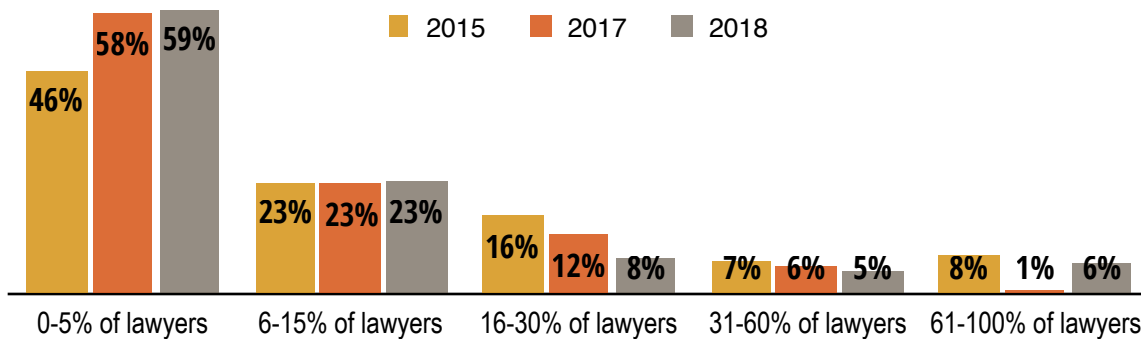
At the majority of firms (59%), only 0-5% of lawyers use CRM for business development. The year-over-year trend echoes what we saw in Figure VI above; even fewer lawyers are using CRM than in previous years. The weighted average was a range of 8-18% lawyers using CRM for pipeline management within a given firm. If omitting firms with 1-30 lawyers from the data set, the weighted average drops to 6-15%.

Given the increasingly competitive legal market where business development is more important than ever, this begs the question: if lawyers are not using CRM for business development, what *are* they using? The answer to this question is outlined in Figure VIII below.

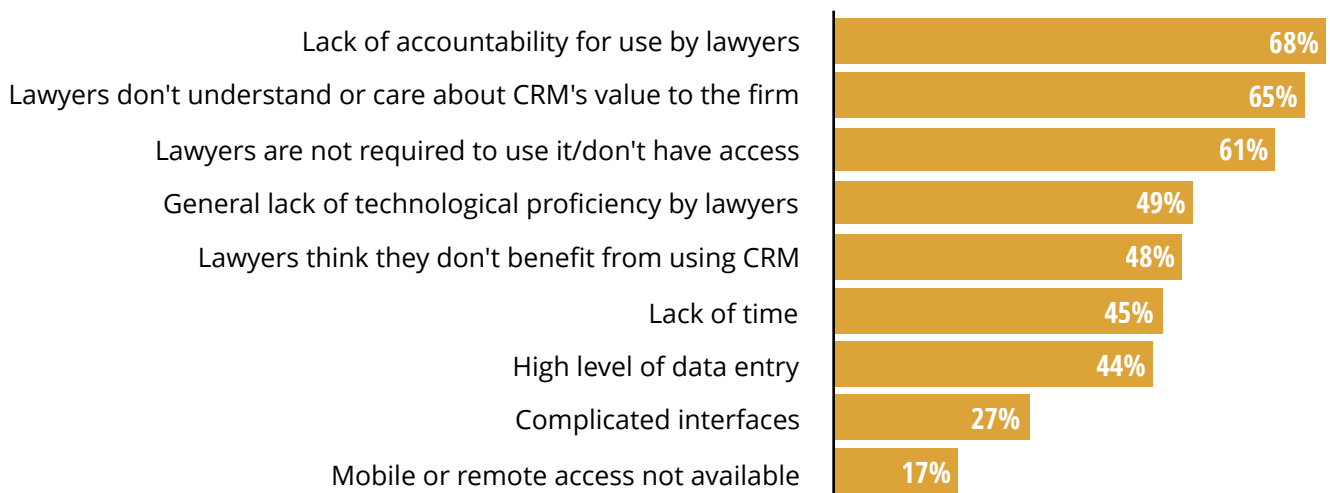**Figure VIII.** Systems for Tracking Lawyer Business Development
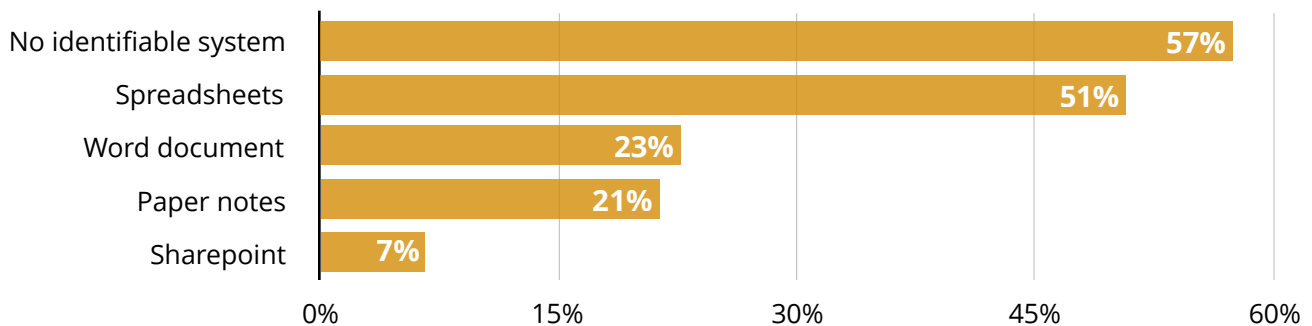
Figure VIII tells a concerning tale. 57% of survey respondents reported that for those lawyers who are not using CRM for business development, there is no identifiable pipeline management system being used instead. Respondents were able to select more than one answer, which is why the figures add up to more than 100%. This means that for lawyers who do not use CRM (which is almost all of them), some combination of spreadsheets, word documents, paper notes, Sharepoint, or – for well over half the marketplace – **no identifiable system is being used to track business development activities**.

While CRM is useful for marketing activities, these data clearly show that it is not an effective tool for tracking lawyer business development. In order for marketers to find a workable alternative to a platform lawyers refuse to use, it is useful to examine the reasons behind low CRM utilization by lawyers. We do so in Figure IX.

Reasons for Low CRM Utilization by Lawyers

Respondents were asked to respond to the following prompt: "For lawyers who do not utilize CRM for client pursuit or pipeline management, I believe the following factors contribute to low utilization (select as many as you deem relevant.)" Multiple reasons could be selected, and a write-in box was provided for participants to list reasons not explicitly stated. The results are shown in Figure IX below.

Figure IX. Factors Contributing to Low CRM Use by Lawyers

Factor	%
Lack of accountability for use by lawyers	68%
Lawyers don't understand or care about CRM's value to the firm	65%
Lawyers are not required to use it/don't have access	61%
General lack of technological proficiency by lawyers	49%
Lawyers think they don't benefit from using CRM	48%
Lack of time	45%
High level of data entry	44%
Complicated interfaces	27%
Mobile or remote access not available	17%

Of the nine options, the top six all had to do with human behavior rather than shortcomings of the CRM software itself. Other minor reasons listed for low utilization included:
- CRM in early stages of implementation
- Lawyers have an aversion to sharing their contacts with other lawyers
- Poor data quality

Lawyer Utilization Rates by Platform

Because we studied CRM bolt-ons and augmentation platforms in addition to traditional CRM this year, we endeavored to study the differences in utilization, features, and ROI between the various platforms available in the marketplace. To determine lawyer utilization, we analyzed the data from Figure VII to determine average utilization rates for individual platforms. Figure X represents the median value of weighted average ranges. Note that this chart does not correlate to each platform's market share; rather, it shows the average percentage of lawyers who use the software within their respective firms.

Figure X. Lawyer Utilization Rates by Platform

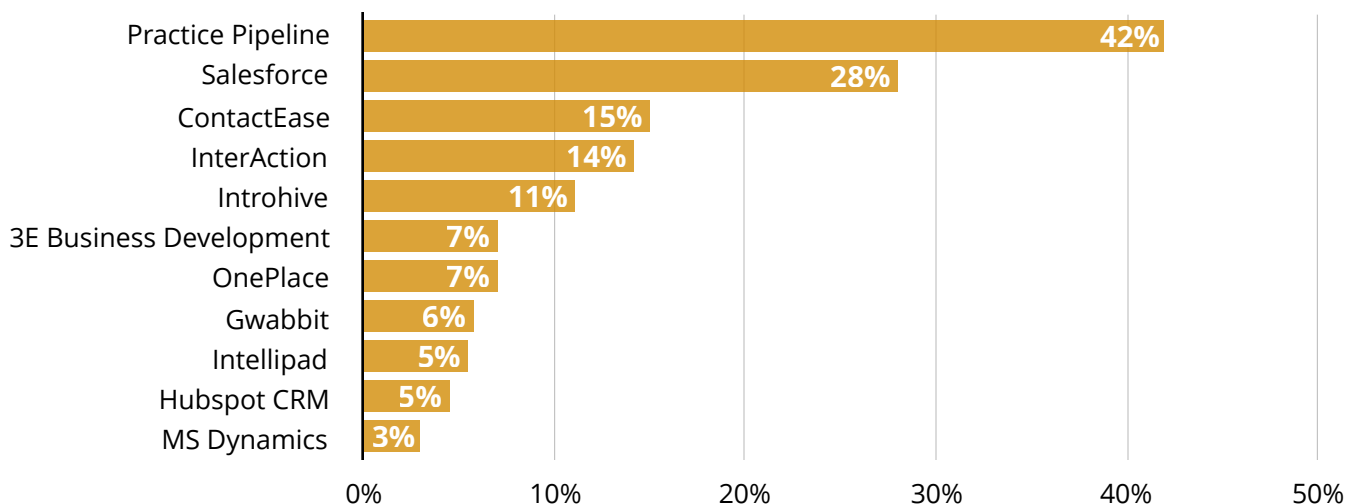| Platform	Utilization
Practice Pipeline	42%
Salesforce	28%
ContactEase	15%
InterAction	14%
Introhive	11%
3E Business Development	7%
OnePlace	7%
Gwabbit	6%
Intellipad	5%
Hubspot CRM	5%
MS Dynamics	3%

Figure X represents the percentage of lawyers within a given firm that use each platform regularly. Note that these utilization rates are not necessarily based on the full lawyer population – only lawyers who have access to the platform.

Practice Pipeline performed unusually well in this comparison due to its singular purpose: to maximize lawyer utilization. The tool is typically used as a CRM bolt-on or as part of an independent business development initiative. It is less encumbered than multi-purpose CRM platforms, hence the disparity in Figure X.

Interestingly, the second most-used platform was Salesforce, a non-legal CRM built for enterprise sales teams. Keep in mind that Salesforce's market share was very small compared to other platforms (2% representing 2 firms among our respondents) and the platform is still in its honeymoon phase at most firms. Because it is a sophisticated multi-purpose platform like InterAction (offering an attractive range of features but also a similarly complicated environment for lawyers to navigate) it will be interesting to see where its utilization rate settles in future studies.

Top Features of Each Platform

No two platforms are exactly alike, and the process of researching and vetting prospective platforms can be a time-consuming task for legal marketers. To aid in this task, we used the data from Figure V on most-frequently-used features and parsed it out by platform in Figure XI below. The table below shows each platform's three most highly rated features, indicating they are used more frequently at respondent's firms than other features built into each platform.

Figure XI. Most-Used Features by Platform

Platform	Feature #1	Feature #2	Feature #3
3E Business Development	Contact management	Email analytics tracking	Email marketing integration
ContactEase	Contact management	Email marketing integration	Email analytics tracking
Gwabbit	Email analytics tracking	Web forms, web-to-lead	Contact management
Hubspot CRM	Email analytics tracking	Marketing automation campaigns	Web forms, web-to-lead
IntelliPad	Contact management	File storage, sync, and share	Email marketing integration
InterAction	Contact management	Email analytics tracking	Email marketing integration
Introhive	Contact management	Email analytics tracking	File storage, sync, and share
Microsoft Dynamics	Email marketing integration	Email analytics tracking	Contact management
Oneplace	Email analytics tracking	Contact management	File storage, sync, and share
Practice Pipeline	Pipeline management	Reporting and dashboards	Mobile version
Salesforce	Contact management	Pipeline management	Reporting and dashboards

Law firms should select a platform that best fits their needs. Depending on which marketing activities are most frequently employed at your firm, the above list may assist those who are considering switching to a new platform or rolling one out for the first time.

It is interesting to note that the two platforms with the highest lawyer utilization in Figure X above, Practice Pipeline and Salesforce, both have pipeline management as a frequently-utilized feature in Figure XI. The data seem to indicate that lawyers tend to have higher adoption rates using platforms built for pipeline management.

A Question of ROI

Whenever firm profits are threatened, it becomes increasingly incumbent upon marketers to justify their expenditures in the form of proven ROI statistics. Despite the fact that 77% of firms have CRM, 36% of them are in a poor position to effectively measure its resultant ROI.

The final survey question asked: "What level of *quantifiable* return on investment (ROI) has your firm-preferred CRM delivered using a scale from one to five?" With one meaning "No ROI" and five meaning "High ROI." An option was also provided for those firms without sufficient data to effectively assess ROI. We compared the results of each platform, combining the scores into weighted average "ROI Scores." The results are outlined in Figure XII below.

Figure XII. What level of ROI has your CRM delivered?
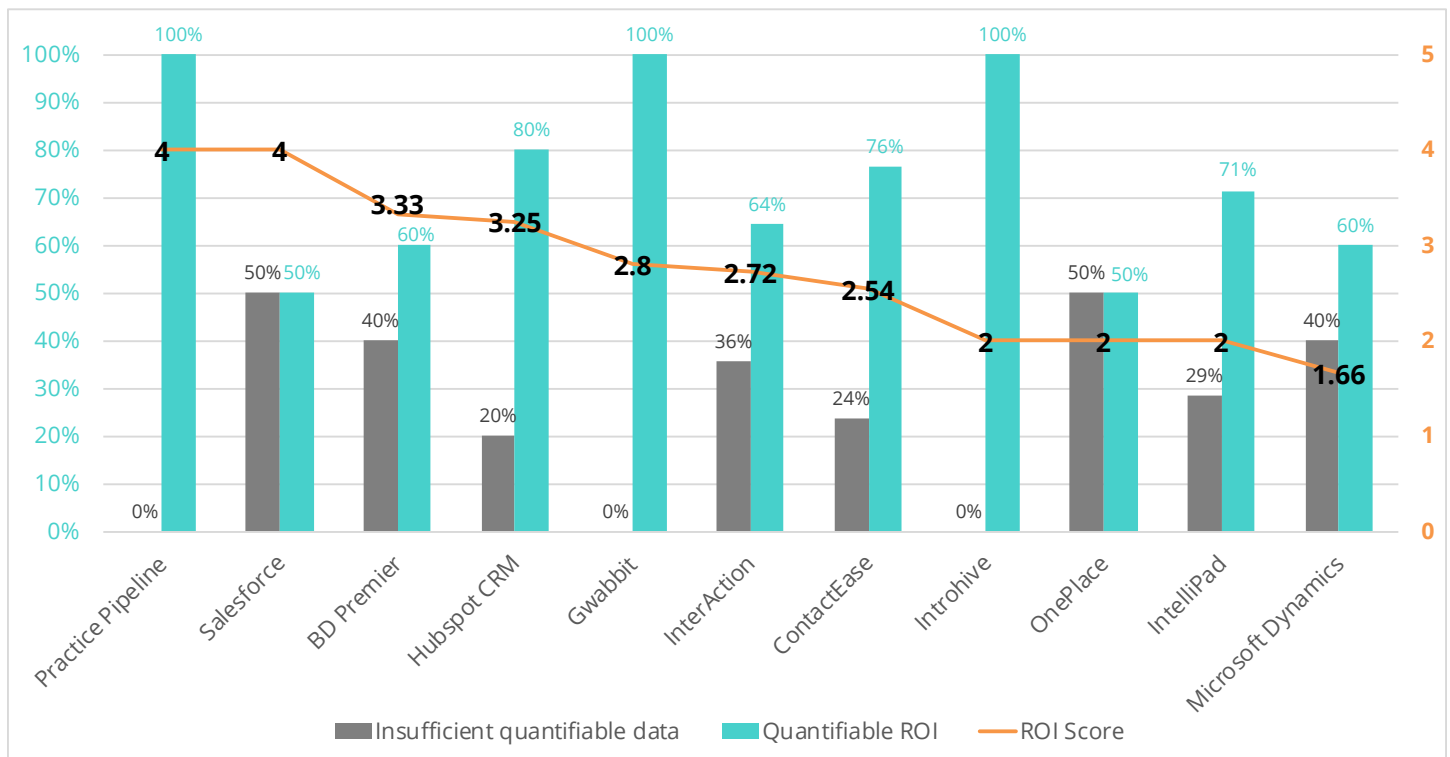
In Figure XII, the turquoise bars represent the proportion of respondents who were able to quantify the platform's ROI. The gray bars represent the proportion of respondents who had insufficient quantifiable data to determine ROI. The turquoise and gray percentages add up to 100%.

Only three platforms had 100% quantifiable ROI: Practice Pipeline, Gwabbit, and Introhive. One would assume that these platforms had clear enough reporting features or a direct enough connection to business development revenue that their ROI can be measured effectively. Most platforms were reported to have some level of insufficient quantifiable data to determine an ROI.

The orange line represents the weighted ROI score – the scale is measured on the right-side Y axis. This was calculated by isolating the responses of those who *could* quantify ROI and asking them to rate the

level of ROI on a scale from one to five. Those platforms with the highest ROI score are shown in descending order from left to right across the chart.

Interestingly, the data in Figure XII are similar to those of Figure X, which measured platform utilization. In the previous figure, Practice Pipeline and Salesforce had the highest lawyer utilization rates. Moreover, in Figure XII, Practice Pipeline and Salesforce have the highest ROI scores (both had four out of five). Higher lawyer utilization is clearly correlated to higher ROI.

Conclusion

CRM is becoming more prevalent within law firms than in previous years. The legal CRM marketplace is also becoming gradually more competitive. New entrants are now seeing an increase in their market shares, and the respective market shares of market leaders are becoming slightly diluted.

The most-frequently-used features in legal CRM center around email integration. Email is one of the primary channels for one-to-many marketing, and email clients are also one of the only types of technology platform that lawyers consistently use. Thus, it may be the only option for many firms to gain access to their lawyers' contacts: a platform that automatically integrates with or scrapes data from their emails. Business development activities like lead capture and pipeline management are used less frequently in legal CRM.

The primary responsibility for maintaining CRM data falls with marketing and business development professionals. However, this year law firms place less expectation on lawyers and more expectation on external data stewards to maintain CRM data.

At the majority of firms, fewer than 5% of lawyers use CRM for business development. The remaining majority of lawyers, for the most part, do not have any identifiable system of tracking their business development activity. While CRM is useful for marketing activities, it is ineffective for lawyer business development due to a lack of accountability, lawyers failing to understand or care about CRM's value to the firm, and lawyers not being required to use it or not having access to it.

There is a clear misalignment of incentives causing this dynamic, indicative of an outdated business model and a management structure that is failing to address emerging needs. The only people within the firm who are tasked with holding lawyers accountable for CRM use are marketers, who are also employees with limited power over those whom they are trying to hold accountable. Lawyers fail to appreciate CRM's value to the firm because there are few consequences when they ignore it. Many firms don't provide lawyers with access, which makes financial sense unless there is no alternative system for tracking their business development activity. Since lawyers are incentivized to bill as many hours as possible, any time they spend using CRM cuts directly into their paycheck.

The platforms that have the highest lawyer utilization rates are those with robust pipeline management capabilities, like Practice Pipeline and Salesforce. These platforms also generate the highest ROI. However, law firms should be diligent about assessing their needs and choose a platform based on which platform includes features that will meet their requirements.

Best Practices

In light of this conclusion, we offer a set of best practices on how to choose the right CRM platform for your firm, promote higher CRM utilization, and track quantifiable data in order to calculate an ROI. These recommendations are based on over 15 years of experience working with law firms worldwide.

1. **Select a CRM that suits your needs.** There is an increasingly large availability of legal CRMs, bolt-ons and augmentation platforms, and each has a slightly different focus. Law firms should compare each platform's top features with the needs of their marketing department and lawyers to identify which platform(s) are most compatible. Many of these platforms are built to work together, so budget for whatever combination will meet your needs and generate the greatest ROI.

2. **Maintain your data and look for ROI.** Very few lawyers use CRM, and firms are relying more and more on outsourced data stewards to preserve data integrity. Part of the upkeep required with any technology platform is ensuring that data quality is high and ROI is tracked. To identify the ROI of your CRM platform, you must tie it to business development revenue. Most CRM platforms have simple dashboard reports that can display this information, but reports are only as useful as the data that informs them. As the old adage goes, "garbage in, garbage out." If you have not yet invested in data stewards, consider doing so – and make sure you are tracking ROI. When marketers can demonstrate value with a proven link to business development revenue, they can argue a stronger business case for approving their requested budget line items in the future.

3. **CRM is for marketing; pipeline management is for business development.** CRM is undeniably useful for marketing purposes such as database management and mass mailings. But for lawyer business development, traditional CRM isn't a good fit. Pipeline management tends to be simpler and is designed specifically for business development. It organizes the action steps needed to move an opportunity further down the sales pipeline. Consider investing in a pipeline management platform like Practice Pipeline, or a sales pipeline-focused CRM like Salesforce, to increase lawyer utilization and, ultimately, ROI.

4. **Change management begins with tracking.** In a saturated marketplace where 57% of law firms don't bother to track business development opportunities and activities, a clear competitive advantage emerges. Introduce a system your lawyers can use to identify key targets. Incentivize their utilization through protocol (reimbursements are contingent on opportunity tracking) and gamification (prizes for the most active business developers). If you don't have a tracking system in

place, start with something simple like a shared excel spreadsheet. In the words of Peter Drucker, "if you can't measure it, you can't change it."

5. **Increase business development accountability.** As indicated in Figure IX, the top reason for low CRM utilization among lawyers is lack of accountability. You can address this by meeting at least monthly with your lawyers to review their pipelines and talking through their business development challenges. If your BDMs have too little time for monthly pipeline meetings or are not culturally empowered to hold lawyers' feet to the fire, consider outsourcing accountability to a business development coaching firm.

6. **Don't switch platforms unless absolutely necessary.** Changing a CRM platform is an expensive endeavor. It costs money, time, and often political capital if firm leaders are not unanimously aligned around a new product. Before you embark on a completely new direction, explore some of the CRM augmentation tools that are entering the marketplace. You may be able to accomplish your objectives with a few inexpensive bolt-ons and patch them into your existing CRM via custom APIs.

About the Authors

David Ackert is the President of Ackert Inc., a business development coaching and training firm with law firm clients across the globe. Widely recognized as a pioneer in the intersection of business development coaching and technology, David is the founder of Practice Pipeline, a pipeline management software platform that integrates technology with peer-group coaching to improve business development results. He is also the founder of Practice Boomers, a BD training program that integrates e-learning with group coaching to generate consistently measurable ROI to law firms.

Olivia Watson is the Senior Marketing Manager at Ackert Inc. She has worked in multiple industries on diverse projects including environmental policy change advocacy, calculating greenhouse gas emissions and carbon offsets in large-scale systems, data trend reporting in the financial services sector, competitive intelligence in the fashion industry, and numerous marketing and business development initiatives in B2B SaaS. Her written work has been featured/quoted by various publications including *Strategies Magazine, JD Supra, PM Magazine*, and the American Bar Association.

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