



## Bull, Son & Schmidt puts Legrand CRM into practice with a positive verdict

A law firm that prides itself on using simple jargon deploys a new tool to deliver even better client interaction

**A** well-established Sydney law firm with a strong reputation for communicating simply has turned to technology to make the client experience even better.

Bull, Son & Schmidt, a 136-year old firm, prides itself on its strong sense of respect for its clients and offering 'no bull' business and personal legal services. In fact, it markets itself under the tag line 'Lawyers you can understand' – a welcome point of difference for a profession renowned for using complex jargon.

### Capturing retained knowledge

The firm's clients represent almost every area of public and private enterprise. Many individual and family clients have been with the firm for decades and sometimes, generations. However, loyalty isn't only limited to clients. A number of staff have been with the organisation for 20 years or more. There's a level of continuity and depth of client knowledge at Bull, Son & Schmidt that many of its competitors envy.

Last year, the firm's senior partner, Richard Schmidt, decided to strengthen the firm's ability to service clients with the introduction of a formal client contact documentation system. "We wanted to better track our contacts with clients and didn't want to be relying on memories which can fade." Although the firm's existing practice management system provided limited capabilities in this direction, it was cumbersome. Deriving new reports relied on a single staff member with Crystal Report writing expertise.

Schmidt set his sights on a dedicated customer relationship management (CRM) system; one that would enable partners and staff to capture contact information, link associated contacts and document every historical detail for every client. The software would need to integrate with the practice management system to avoid unnecessary duplication of data and to minimise the risk of data inaccuracies creeping in across the two systems. It would also need to integrate with the practice management reporting system developed by Schmidt himself some years earlier.

Schmidt could see potential for a CRM system to assist in the distribution of Bull, Son & Schmidt's periodic special interest newsletters and email alerts. "We believe our role is to enable people to make informed decisions based on their available options," Schmidt said. "So we provide simple explanations and information on topics that are relevant to our clients."

Given the pressures of a busy practice and differing levels of computer expertise among staff, the CRM system had to be very easy to use and in a readily-accessible format so that records could be called up onto a desktop screen quickly when responding to client phone calls.

### Some vendors didn't listen

Schmidt evaluated numerous CRM systems over the next few months. "Some were very complicated. They could do all kinds of wondrous things providing you could find someone who could drive

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*Richard Schmidt  
Senior Partner  
Bull, Son & Schmidt*

**Legrand CRM CASE STUDY**



them. Many of the vendors didn't really listen to what we wanted. They were just looking to highlight the features and functionality of their own software."

Early 2010, Schmidt selected Legrand CRM for Bull, Son & Schmidt's requirements. At the same time he engaged Legrand Solutions Partner, Axsapt, to manage deployment and carry out the custom development necessary to ensure full integration with the firm's existing software systems.

Axsapt's first step was to sit down with Schmidt and others in the organisation to better understand what data needed to be captured in Legrand CRM. Once this had been mapped out, they began to document processes and establish conventions such as client categories, naming conventions, and identifying how each field should be recorded. Simple things had to be decided such as where to record a change of address –whether that needed to be in the practice management software or in Legrand CRM. Then there was the matter of how to deal with new file and changes of addresses.

"This period was time consuming, but absolutely necessary," Schmidt said. "Axsapt had to obtain an understanding of what we need in the legal industry and learn what we do well. One benefit of this period was that it did make us tidy up our database tremendously."

More than 10,000 clients, supplier and other business contacts were imported from LexisNexis into Legrand CRM. Some were archived; others were

categorised so that solicitors could easily identify areas of interest such as whether a person was a business client, a family law client or had engaged the firm for matters relating to employment law. All up, the project took nearly four months but refinements continue to this day with Schmidt considering adding new fields to reflect changing information demands.

### Know your customer

"Now, whenever I have to call a client that I haven't seen for a while, I first look up their record in Legrand CRM to refresh my memory," Schmidt said. "Similarly, if a solicitor is absent, their clients can still expect professional and knowledgeable service. I can take the call, click on their profile and have all their background information immediately. It keeps us fully informed and is helping us to better manage clients across the entire practice."

Each record includes contact details, a history of client interactions, plus any contacts associated with the client – such as executors or powers of attorney. "It shows information such as how long they've been a client, what matters we've handled for them over the last ten years and when and how we last contacted them."

Identifying incoming callers has become easier for anyone answering the phone. As a call is received, Legrand CRM searches the database to find a matching number then displays the appropriate client record. It has enhanced to the firm's level of customer service, particularly for personal clients.

Over the coming months, Bull, Son & Schmidt will begin exploring the marketing campaign aspects of Legrand CRM. Schmidt hopes to increase the number and frequency of special interest email newsletter, using the newly-defined client categories and better target recipients. "Legrand CRM will also ensure we maintain an audit trail of what goes out and when."

He said that throughout the project Axsapt has been helpful, providing good service during the deployment and continuing online support. As for Legrand CRM, Schmidt calls it "a very, very useful management tool!" ■

## AT A GLANCE

### Industry

Law firm

### Business objective

To improve client contact and services by creating a readily-accessible, easy-to-view fully documented history of client information

### Solution

Legrand CRM with custom integration with Bull, Son & Schmidt's LexisNexis practice management system

### Business benefits

Knowledge about client histories is no longer reliant on staff memories. Improved customer service due to formally documented contact records, complete histories in a single [Legrand CRM] record and an enhanced ability to market additional services to clients

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