

McGuireWoods uses Intapp to overhaul its CRM for business development

How does an Am Law 100 firm convince skeptical lawyers that the firm database should play a central role in business development efforts especially when there's little confidence in the data? For McGuireWoods, Intapp Relationships proved to be the answer.

Confronting missing data and lawyers' doubts

When Chris Mann joined McGuireWoods as the firm's CRM manager, he was given a clear directive: improve business development efforts by championing the firm's existing CRM. The initiative was intended to support a massive relaunch of the CRM to 23 of the firm's offices.

But Mann faced a huge challenge. The firm's lawyers had lost faith in the system and resisted using it. Not only were key contacts missing, incomplete, or out of date, but all-important relationship data was almost nonexistent.

"When a lawyer looks up a new client, and it's not there, it turns them off to the CRM as a BD tool," said Mann.

Managing a complete data overhaul in 5 months

Persuaded by the email signature scraping and relationship-tracking technologies offered by Intapp Relationships, Mann convinced McGuireWoods leaders to implement an 18-month study, with an eye toward cleansing and replenishing the incomplete database and rebuilding lawyer trust in the CRM. Intapp Relationships became a central selling point for the CRM redeployment.

McGUIREWOODS

Founded in 1834, McGuireWoods – the 17th-largest firm in the U.S. – provides legal and public affairs counsel to corporate, individual, and nonprofit clients worldwide. McGuireWoods employs more than 1,100 lawyers and maintains 26 offices across the U.S., Europe, and Asia.

With limited human resources and a brief timeline, Mann wasted little time in adding lawyers whose email accounts would be harvested for contacts' signatures. He opted for partial automation, with Intapp Relationships sending newly discovered contacts directly to the CRM; he reserved human review for updates to lawyers' contact information in the data quality management (DQM) console. Using this method, the firm required just two to four employee-hours per day.

Anatomy of an Intapp Relationships database transformation

Study length	18 months
Participating lawyers	1,112 (firmwide)
Level of effort	2 people working fewer than 2 hours per day
Missing contacts recovered	79,807
Duplicate contacts removed	93,000
Total contacts maintained	Increased from 110,000 to 284,000
Relationship-enhanced contact rate	Increased from 2% to 75%
Marketing email bounce rate	Decreased from 16% to 2.7%

Turning skeptics into believers

Six months following the CRM relaunch, Intapp Relationships had helped McGuireWoods create or update 63,500 contacts. A year later, the CRM had grown from 110,000 to 284,000 contacts, with 75% of all contacts now including a trackable business development relationship. And because the right people now were receiving the firm's invitations and marketing emails, bounce rate decreased from 16% to 2.7%.

Building a complete picture with Intapp Relationships

According to Mann, Intapp Relationships also gave the firm's marketing and business development departments a better way to work with lawyers.

"We can now slice and dice relationship data for prospecting or ROI tracking," said Mann. "We can dig into our top clients, and track where relationships are lacking – where we need to try to do more. We can ask the question, 'Does this client's rank within the firm match the amount of email traffic?' We've begun building a complete picture for the marketing knowledge base."

Mann reports that firm management is very pleased with the initiative, and especially appreciate the insights into event ROI. "Following an event, we can see new relationships when they begin, then follow up with lawyers," said Mann. "From introduction to pitch to conversion, we are able to see the pipeline develop around a relationship."

Executive summary

McGuireWoods — a full-service firm providing legal and public affairs counsel to corporate, individual, and nonprofit clients worldwide — needed help to restore faith in its CRM, which suffered from missing, incomplete, and out-of-date contacts. After implementing Intapp Relationships, McGuireWoods tripled the percentage of relationship-tagged contacts and restored lawyer confidence in the CRM.

Challenges

- The firm's CRM was plagued with missing and inaccurate data
- Key relationship information was almost nonexistent
- Lawyers were reluctant to use the CRM for business development needs

Results with Intapp Relationships

- **Increased pipeline visibility:** Firm leaders and partners can now watch relationships develop from introduction to pitch to conversion
- **Improved contacts:** The CRM grew from 110,000 to 284,000 contacts, with 75% now including a trackable business development relationship
- **Enhanced email delivery:** Bounce rates dropped from 16% to 2.7%



“Following an event, we can see new relationships when they begin, then follow up with lawyers. From introduction to pitch to conversion, we are able to see the pipeline develop.”

Chris Mann, CRM MANAGER, MCGUIREWOODS

