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James Grandage,
 Business Development
 Assistant Manager

Client: Halliwells LLP

Tikit CRM team delivers practical support and strategic advice

Haliwells LLP is a top 20 UK law firm, with offices in Manchester, Liverpool, London and Sheffield. Investment in technology is recognised by the firm as essential in achieving competitive advantage and providing the best possible service to their clients.

The situation

Haliwells LLP embarked on a project to implement a new Client Relationship Management (CRM) programme throughout their UK offices. Previously the firm had no CRM system – there was no central repository for managing contact data and individuals tended to look after their own data using Outlook and Rolodex systems.

The business development team recognised that this situation limited the effectiveness of the firm’s marketing and business development activities. The Data Protection Act also raised concerns. The firm was keen to ensure that it was compliant with the Act but processes around the management of data needed to be improved in order to achieve this.

The team also saw the value that would come from sharing contact and relationship intelligence across the firm. Information such as client profitability, key relationships and recent activities would enable the team to undertake more sophisticated and targeted marketing campaigns.

After reviewing a number of different options, Halliwells LLP selected to work with Tikit to implement LexisNexis InterAction and Tikit eMarketing.

James Grandage, Business Development Assistant Manager, Halliwells LLP says: “InterAction was the obvious choice for us. It’s designed specifically for professional services firms and is highly configurable which means that it can be adapted to meet our specific requirements. Tikit eMarketing further extends the capabilities of InterAction. It allows us to send online communications such as newsletters and event invites to our InterAction contacts and automatically record their responses directly in the database.”

The project approach

One of the key reasons this project has been so successful is the approach that Halliwells LLP and Tikit took when designing the project. From the outset the focus was on the business benefits the firm wanted to achieve.

About Tikit

Tikit is the leading independent provider of IT consultancy, services and software to legal and accounting firms. Tikit’s clients in the UK, Europe and the United States include more than 90 of the UK’s top 100 law firms, 20 of the top 50 US law firms and 18 of the top 50 UK accountancy firms. Headquartered in London – and listed on the London Stock Exchange (AIM:TIK) – Tikit combines in-depth knowledge of the business needs of legal and accounting firms with a unique capability to plan, implement, integrate and support virtually all of the IT requirements of a modern legal or accounting practice.

Learn more at www.tikit.com

Tikit CRM team delivers practical support and strategic advice – continued

In consultation with Tikit, Halliwells LLP developed a project plan with clearly defined business objectives that needed to be met by the implementation, including:

- Achieving compliance with Data Protection and eMarketing regulations
- Increasing the pool of prospects available to the business development team
- Developing the technology to become a “cornerstone” of future IT development

Culture – managing change

In order to ensure acceptance of the new system, internally known as ‘IQ’, the Halliwells LLP project team embarked upon a strong internal education and promotion campaign.

From the start the project was visibly backed by the firm’s management; a Managing Partner was appointed overall Project Sponsor and a Steering Group was established, made up of representatives from key function areas including IT, HR and Marketing. Separately a project group was set up to manage the day to day implementation and roll-out.

Such high profile commitment gave the new system the credibility that it needed to be taken seriously by the partnership and the other Halliwells LLP employees.

Content – managing data

The project team knew Halliwells LLP’ employees would only start using InterAction if the data available was of better quality than the data people currently had access to.

Consolidating and cleaning the existing data was a huge job, but vital to the success of the project. Tikit Data Services managed the process and spent 6 months bringing the data together, checking and updating it to ensure that it was accurate and complete.

Once the data was up-to-date, it was imperative that the firm had a comprehensive data management plan going forward. Nineteen secretaries were trained as Data Stewards and one individual was appointed as a full-time Data Executive. These secretaries also acted as “super users” – able to give advice to other users and were strong advocates of the new system across the firm.

The consolidation of the data had immediate benefits for the firm:

- There are 3.5 times more contacts stored in the new database
- The number of contacts with an e-mail address increased by 500%
- The number of contacts with job titles increased by 200%

Ongoing data change management processes mean that the data is constantly being monitored, reviewed and updated

Despite best efforts, Halliwells LLP knew that contact details erode quickly and were keen to implement initiatives to combat this. Using Tikit eMarketing the firm sent an electronic Christmas card to 18,500 contacts, which offered the recipients the opportunity to view and amend the details held on them by the firm.

The response rate was excellent and the firm received 5000 data amendments – all of which were automatically submitted to the database.

They also gained valuable business development information as individuals updated their interest areas and other business information. The option to “opt-in” and “opt-out” of receiving communications meant that the firm was adhering to the Data Protection Act – a key objective at the outset of the project.



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Capability – making the software work for you

It was important to ensure that the functionality offered by the technology supported the requirements of the users without intimidating them with its complexity. Tikit's technical consultants worked closely with the Halliwells LLP Project Team to ensure that the system was configured to meet the specific needs of the firm.

Access to the database was made as easy as possible. When a user logged onto their PC they were automatically given access to the system and the InterAction tool bar was made available across all commonly used applications. This meant that people were able to use InterAction from Microsoft Outlook and Word – applications that they already felt comfortable using.

Grandage says: "InterAction offers a wealth of technical capabilities and that's why we selected it for Halliwells. During the first phase of the project we knew that we had to get the right balance between functionality and ease of use. If users felt daunted by the complexity of the system they simply wouldn't use it. But at the same time if the functionality of the system didn't stand up to their requirements then we were in trouble."

The results

Now that the first phase of the roll out is complete, the project team is able to tick off the key business requirements outlined at the beginning of the project. The key results include:

- Significant user acceptance across the firm with 60% of people accessing the system
- Improved data quality and adherence to the Data Protection Act
- 350% increase in the pool of prospects available to the business development team and better targeting ability through the recording of client and prospect interests
- Bid team is now able to regularly identify and contact those fee earners in the firm who already have a relationship with a prospect or target prior to tender
- IQ firmly embedded at the heart of the firm and ready for phase 2 of the project

Going forward – delivering contact intelligence

Halliwells LLP plans to build on the success of the initial implementation and extend the amount of information that is recorded in InterAction. This will include recording Matters and Opportunities, and integrating with the firm's financial system to make client financial data available through InterAction. This will enable the firm to perform sophisticated client and prospect analysis, ensuring greater returns on marketing and business development activity.

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About Halliwells LLP

Halliwells LLP is a national law firm providing a range of multi-disciplinary legal services. It provides pragmatic, solution driven advice that adds value to its clients' businesses. The firm has grown rapidly in recent years, and embraces an internal culture of motivation, commitment, enthusiasm, and reward. Its business is founded upon client satisfaction. Halliwells LLP continues to strive to improve the service it offers and, where appropriate, works with its clients to establish agreed service standards.

Learn more at
www.halliwells.co.uk

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