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CRM & Knowledge Manager,
Pannone

Client: Pannone

Tailored user training helps whole firm move Pannone's business development efforts forward

The adoption of 'best practice' principles and an enlightened training programme have helped Top-50 UK law firm Pannone LLP successfully adopt two leading legal CRM applications – LexisNexis InterAction and Tikit eMarketing.

The 355-strong fee earner firm elected to implement InterAction in an effort to collect, organise and make visible to staff the firm's entire contact database.

James Grandage, CRM & Knowledge Manager at Pannone, says the firm wanted to identify and expose the interconnections between contacts, companies and matters, so lawyers could quickly and easily leverage firm knowledge.

"We also wanted to provide data change management and security controls to enhance usage throughout the firm and streamline our business development and marketing efforts."

Grandage says the key to the successful implementation and high user uptake of the CRM system was the training programme devised.

"We initially faced some resistance to the InterAction system. Quite legitimately, questions were asked about how much advantage the firm would reap from the system. We realised early on that in order to implement the system successfully we needed to make apparent to all our different users the benefits of the system, and empower them to operate it correctly."

Pannone deployed a multi-level, one-to-one training programme with appropriate tuition given to different types of system users. "The training programme for partners was different from that delivered to the secretaries, for instance," says Grandage. "This ensured training was relevant to the user and allowed them to see the benefits that they could reap from using the system."

Pannone also created a 'training bible' and 'InterAction sponsors' who acted as product evangelists for each of the firm's departments. "The sponsors were super users, who lead by example. The advocacy they provided inspired others to explore what they could get out of the new application," says Grandage.

As a result the firm is now taking maximum advantage of InterAction's rich functionality – particularly the Opportunities modules.

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.

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Tailored user training helps whole firm move Pannone's business development efforts forward – continued

"We use InterAction's Opportunities module as a referral management tool within the firm. We have around 40 to 50 new referrals logged each month, and these are available for all relevant staff to see. This allows us to make smarter decisions on whom we should be referring work to."

Grandage says maintaining a close eye on how the system is used within the firm is the key to the strategic and tactical benefits the firm reaps from the system.

"We monitor usage of the system closely. Our InterAction sponsors report back to management on how many contacts and activities are added and the number of referrals made in the system. This increases competition amongst staff, highlights 'star' users and maintains visibility of the system to users."

Newly appointed partners at Pannone are trained and 'on board' with the concept when they start work at the firm, he says. They also undertake business development-related training courses to ensure their working practices match the way the firm uses the CRM system.

Grandage says Tikit eMarketing works seamlessly with the InterAction system, providing email delivery and campaign management capabilities.

"We use it for surveys, event management, targeted campaign mailers and newsletters. All the marketing campaigns are recorded against the contact in InterAction by an automatic activity being added to the contact's file."

Grandage says the firm has cut down significantly on the amount of postal marketing – reducing marketing spend and administration oversight.

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Says Grandage: "The combination of InterAction CRM and Tikit eMarketing is a powerful package. Implemented correctly, with appropriate training support, they not only empower law firm marketers, but enable fee-earners to participate proactively in the firm's wider business development efforts."

"Several partners have stated that InterAction has significantly changed the way they work and InterAction's My Watch List in particular is integral to their daily work.

"By having My Watch List start up automatically each morning, it allows our partners to understand what initiatives their colleagues and indeed the rest of the firm are doing with their contacts."



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About Pannone

Pannone LLP is a full service law firm with clients split almost equally between businesses and private individuals. With roots that can be traced back as far as 1852, the firm now has 355 lawyers, 110 partners and a total staff of 700 who all work within specialist teams focusing on the niche work carried out by their department. The firm is based centrally at its office on Deansgate in Manchester city centre and from here it serves clients throughout the Northwest, as well as nationally and internationally.

Learn more at
www.pannone.com

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