

Veal Wasbrough Implement e1 Metis CRM to Improve Firm-Wide Efficiency

The Customer

A regional firm with a national presence, Veale Wasbrough is recognised as a strong brand for corporate, education, public sector and real estate and the firm's reputation is founded on its impressive client portfolio, level of staff commitment, technical expertise and its creative and dynamic approach to business.

Using e1 Metis client relationship management (CRM) solution, Veale Wasbrough has seen distinct returns in its ability to enhance client service requirements. The software has increased the efficiency of its processes and has vastly improved client communications.

The Challenge

Previously, Veale Wasbrough managed its data using Galaxy Practice Management System with an add-on marketing element, together with numerous Excel spreadsheets. The disparate nature of these data sources prevented any real flexibility. The limitations included an inability to delete any historical data, which meant that the standard of data quality was often poor. Even simple data field validation, such as salutations, were restricted.

CUSTOMER SUMMARY

- The origins of the firm date back to 1815
- 245 employees of whom 125 are lawyers
- 30 partners
- The firm operates from one, modern, open plan and well equipped office in Bristol
- Approximate annual turnover of £14 million
- 8 Full Client SalesLogix users to date
- 230 Web users

e1 METIS WINS

- Different user types and remote access functionality
- Event Management functionality
- Campaign Management ability
- Flexibility and ease of customisation
- Admin functionality
- Confidence in e1 Business
- Back-office integration to Galaxy Practice Management System

Veale Wasbrough holds over 50 client events each year and a further limitation of the original system was that it offered no specific event management or CRM functionality. The system was also extremely slow to run.

The firm recognised that it needed a single data source that would bring together its differing systems and allow information sharing between teams, which would aid communication and help improve cross-selling opportunities. Veale Wasbrough required a system that would enable it to achieve rapid returns in efficiency, especially in terms of the client and matter opening processes, event management and marketing.



The Solution

Due to the obvious drawbacks of the original system, there was unanimous backing throughout the firm to establish a marketing led project to find a fully functional CRM solution. The project team, including marketing, IT and finance professionals, found that e1 Metis CRM solution from e1 Business was the most suitable system for their business.

The key selection criteria used to evaluate were value for money, the flexibility offered to various users, administration functionality, the product's ability to be fully customised to suit the firm's requirements and to match its current business processes.

Having made the decision to implement e1 Metis, Veale Wasbrough chose to roll-out the system on a team by team basis. This allowed the marketing team initially to get to grips with the new system and manage the integration of different data sources. This enabled them to consider all possible scenarios that the lawyers might come up against when using the system and they could then iron out any issues before the changes were introduced. Once the project team were happy with the initial trial, the system was rolled out to the firm's commercial departments. Analysis showed that the majority of benefits were to be gained by the commercial side of the practice. The software has also been customised for private client teams and is in the process of being rolled out.

The Results

When Veale Wasbrough staff log-on in the morning, the Intranet Homepage opens with an e1 Metis generated report which details the latest new clients and matters to the firm with a hyper linking facility direct into client and contact records to help engage staff.

In terms of functionality benefits, the conflict search process is now managed centrally, which has vastly improved turnaround times. There has also been a 65% improvement in time saving for the client and matter opening process. This has negated the need to purchase an additional BPM (Business Process Management) application, saving considerable investment.

The quality of the data has also been improved due to the introduction of data standards and mandatory fields. The system is fully integrated with Veale Wasbrough's Galaxy Practice Management System which enables a holistic view of each client and contact.

Business development benefits include the ability to manage reciprocity with intermediaries and to brief colleagues with up-to-date and relevant information. Business planning processes have been improved through accurate intelligent reporting from the central system, which also means that time is saved when planning meetings.

KEY ACHIEVEMENTS

- Time saving of 65% through more effective business processes
- Improved efficiency
- Cross selling
- Centrally managed conflict searches
- Accuracy of data
- Effective event management
- Accurate reporting
- Full administration of campaigns



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Further benefits gained from the introduction of the new system include the ability to manage marketing campaigns from inception to completion, using sophisticated targeting and segmentation functionality.

The 50+ client events run each year by Veale Wasbrough are now also managed through e1 Metis, improving the firm's ability to plan, execute and measure the effectiveness of all corporate events.

From the clients' perspective, the lawyers are fully up-to-date on all client information such as updates on the communications they have received and the events they have attended. Veale Wasbrough believes that this improved level of client communication will help to increase client loyalty in the future.

The Future

Veale Wasbrough plan to build on the momentum they have achieved with the new CRM system by completing the roll out to all their private client teams. They will also invest time in further developing the software to ensure they maximise the benefits throughout the firm.

The next step is to incorporate the e1 Business Alert module and the e1 Target email marketing module into the system to further enhance the generation of e-zines, which will also log all the data and responses back into the e1 Metis solution to assist with future targeting.

The Project team are also working to integrate money laundering evidence for each client record within e1Metis with links to original scans.

"e1 Metis is a fundamental part of our business development and marketing strategy. Its implementation has enabled us to enhance our business processes and increase the very high levels of service we offer our clients."

Antonia Guise-Tucker, Head of Business Development & Marketing, Veale Wasbrough Lawyers

About e1 Business

e1 Business specialise in Customer Relationship Management (CRM) consultancy, customisation, implementation, training and support. With an award-winning record for customer satisfaction and over 18 years experience across many industries and locations worldwide, e1 understands the business issues facing industry today. e1 Business has the ability to develop solutions that combine expertise with real life experience. Visit www.e1business.com for more information or call (01962) 718270.



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About Veale Wasbrough Lawyers

Commercial law firm Veale Wasbrough was established on 1 September 1988 by the merger of the long standing Bristol firms Stanley Wasbrough and Veale Benson.

The four sectors for which Veale Wasbrough are best known, and for which they supply a range of integrated and coordinated specialist legal services are:

1 Real estate

"Lawyers with a refreshingly commercial approach"
Chambers & Partners

Deemed as "absolutely first class"
Chambers & Partners

2 Corporates

"Veale Wasbrough lawyers stands out for its dedicated focus on the region's business community"
Legal 500

Veale Wasbrough Lawyers is a full-service firm whose business plan is wedded to its commitment to its South West commercial clients"
Legal 500

3 Public Sector

"It competes with the best of the national firms"
Legal 500

4 Independent schools

"The Rolls Royce firm for advice to independent schools"
Legal 500

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