

STUDIO B

Why CRM matters in Professional Services

Most firms do not lack activity. They lack visibility of what happens next.

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Most CRM problems are not technology problems.

- Firms often have the data somewhere
- What they lack is shared visibility, consistent follow-up and clear ownership
- The gap is usually behavioural before it is technical

What this looks like in many firms

- Relationship knowledge sits unevenly across partners, teams and inboxes
- Client contacts and interactions are tracked in personal spreadsheets or email
- Marketing engagement is not consistently carried through into BD follow-up
- Cross-practice opportunities are often discovered by chance rather than design

Result:

**Momentum leaks
between interest
and opportunity.**

What a CRM enables

A CRM becomes the operational layer between marketing, BD and relationship management.

1. Shared relationship intelligence

- One view of clients, contacts and activity
- Less reliance on personal spreadsheets and inboxes

2. Better cross-sell visibility

- See connections across practices and teams
- Surface dormant or emerging opportunities

3. Stronger marketing–BD handover

- Track what happens after campaigns and events
- Turn engagement into follow-up and conversations

4. Clearer commercial visibility

- Understand where momentum is building or leaking
- Support more informed decisions

Why CRM adoption succeeds or fails

Barriers to overcome

- Lawyers may be reluctant to share relationship information or may not yet see the value
- CRM may be seen as administrative rather than commercial
- Data quality, setup and upkeep need ownership and support
- Legacy systems may affect integration choices
- Adoption stalls when systems become complex before simple usage habits exist.



Conditions that support success

- Position CRM as shared commercial infrastructure, not a marketing database
- Treat client and contact data as a firm asset
- Keep data capture and workflows proportionate so lawyers see immediate value.
- Provide practical training and admin support
- Ensure visible backing from firm leadership

Platform shortlist

Platform	Best fit	Main watchout	Budget signal
InterAction+	Legal-specific CRM for firms that want a familiar law-firm model and cross-sell visibility.	Can feel like a heavier programme; budget is quote-led.	Usually quote-based; often higher implementation and support investment
Intapp DealCloud	Best if cross-sell, relationship intelligence and automation are the priority.	Bigger change effort; likely enterprise-level spend.	Usually quote-based; often higher implementation and support investment
HubSpot	Fastest route to joined-up BD + marketing with strong usability.	Not legal-native; matters/experience model needs configuration.	Typically, £1k–£15k+ annually depending on users and marketing automation
Dynamics 365	Strong if the firm is already Microsoft-centric and wants flexibility.	Can become IT/customisation-heavy without tight scope.	£50–£115/user/mo

Public list prices are useful signals only; implementation, integration and support should be scoped separately.

Choosing the right route

For most firms the largest cost is not licences, but implementation, data preparation, integration and training.

Platform choice matters less than **ease of adoption and workflow fit**.

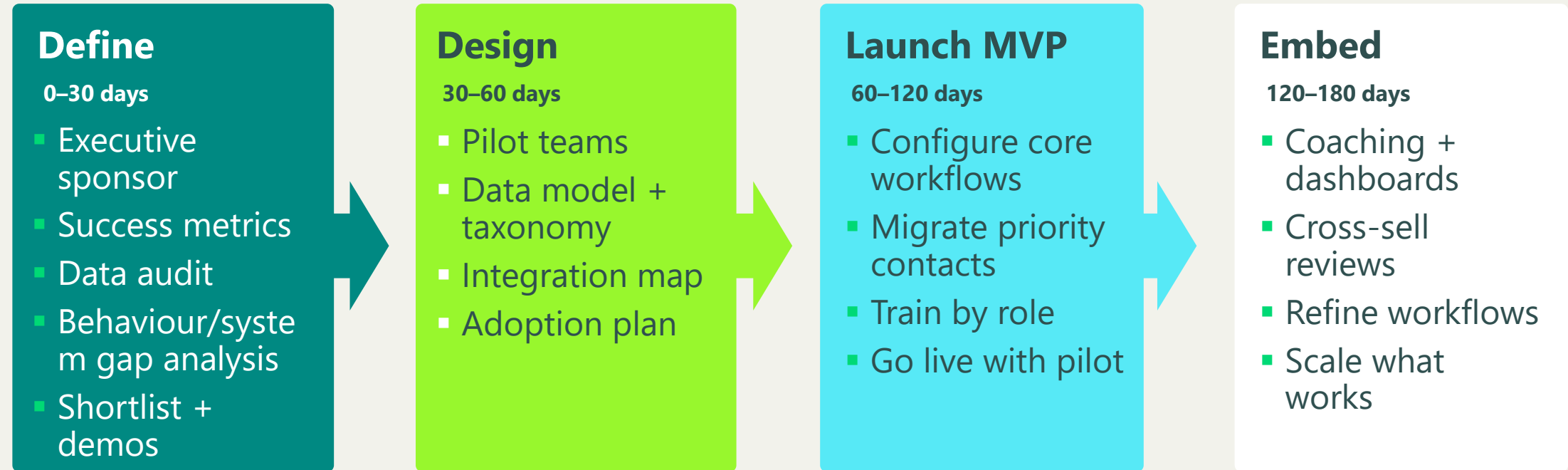
A. Legal-specific route – InterAction+ or DealCloud if cross-sell, relationship intelligence and legal-friendly workflows matter most

B. Lower-friction route – HubSpot or Dynamics if speed, usability and joined-up marketing/BD matter more than legal-native depth on day one

C. Salesforce benchmark – credible, but often better where Salesforce capability already exists

An outline process for introducing CRM

Start narrow, prove value, then scale. A smaller, disciplined MVP usually beats a big-bang rollout in law firms.



What to measure in year one

% of top clients with mapped relationships

Campaigns / events with BD follow-up logged

Introductions between practices or sectors

Pipeline created or influenced by marketing

Active users and data freshness

Best starting point: one practice or sector team, one event/campaign follow-up process, one cross-sell motion, and visible partner sponsorship.

A good CRM should join up marketing, BD and relationship intelligence.

- Not simply to store contacts — but to help firms see, act and learn from client activity in one place.
- Because the real opportunity is not better data.
- It is better visibility of relationships and opportunities across the firm.

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