



#### Company Overview:

With over 1,100 lawyers in 24 offices worldwide, Foley & Lardner LLP is a leading provider of corporate, IP, litigation, and government solutions across a variety of industry sectors.

#### Solution:

360 Solutions Group implemented legal360 engage on Microsoft Dynamics 365 as the firm's new business development, marketing, and relationship intelligence platform.

#### Results:

With legal360, Foley & Lardner has:

- Reduced collisions among practice groups pitching the same client
- Gained visibility of who knows who to make cross-practice introductions
- Improved tracking of marketing events and contact participation
- Reduced unproductive administrative time and overhead

## Foley & Lardner takes business development to the next level with legal360

### Company overview

As a recognized global leader, Foley & Lardner LLP looks beyond the law to focus on the constantly evolving demands that their clients and industries face. With over 1,100 lawyers in 24 offices across the United States, Mexico, Europe, and Asia, Foley offers corporate, IP, litigation, and government solutions across a variety of industry sectors.

With an unyielding focus on client service for 175 years, Foley forges long-term relationships that help them successfully solve their clients' legal issues through practical business advice and cutting-edgemlegal insight. Foley's clients view the firm as trusted business advisors because they understand that great legal service is most valuable when it is relevant, practical, and beneficial to their business.l

### The value of aec360 engage

Like many law firms, Foley's use of a traditional CRM platform had been relatively limited in scope. Foley used the InterAction CRM tool from LexisNexis for many years. However, it was primarily used as a rudimentary tool for managing marketing lists. User adoption of InterAction was limited, which resulted in the data being stale and often inaccurate. Considering its limited business development capabilities, Foley had taken InterAction as far as they could.

"We recognized the need for a more robust CRM platform that could bring industry best tools and processes to the firm's business development efforts," explained Victoria Gregory, Director of Marketing Systems and Operations at Foley & Lardner. "We needed a single solution that could provide a full set of business development and marketing capabilities, so that we could better track our client relationships, pitches, marketing events, and other activities that the firm was undertaking."

### A platform for the future

Foley first evaluated the Thomson Reuters BDP solution but determined that it wouldn't meet the firm's long-term objectives. Foley then decided to evaluate the Microsoft Dynamics 365-based legal360 engage solution based on their prior knowledge of the system. "I had implemented legal360 at two other firms, and knew it was a best-in-class CRM solution within the legal industry," said Gregory. "I knew what legal360 was capable of and knew that it could do everything that would be required by the firm, both now and into the future."

Most critical to Foley was legal360's strong focus around business development. "legal360 not only can handle marketing lists and event tracking, but is very strong in business development, which is where the firm would get the most value out of a CRM tool."

## Data quality management

legal360 offers a unique Advanced Merge tool that helps law firms better track and manage contact details in order to ensure data quality.

*“One of my favorite features in legal360 is the Advanced Merge data management tool. This has been a real game changer in terms of being able to quickly and efficiently keep our data clean, which is something all law firms struggle with. This tool has saved a significant amount of time through automation and has eliminated mistakes by reducing human interaction.”*

**Victoria Gregory**

Director of Marketing Systems & Operations

## Driving user adoption

User adoption is a critical aspect of any CRM deployment, especially in law firms. legal360 is a native extension of the Microsoft Dynamics 365 CRM solution; so it works like the Microsoft tools you use every day.

*“legal360 behaves like a Microsoft product - it’s very intuitive to use and the amount of training required is quite low. If you are familiar with Microsoft products, you have already gotten over the first hurdle.”*

**Victoria Gregory**

Director of Marketing Systems & Operations

## The Microsoft Dynamic 365 + legal360 solution

Foley selected Microsoft Dynamics 365 and legal360 in September 2016 and was up and running on the first phase of their new solution by the end of 2016. Foley uses legal360 to manage:

- Client, contact, and relationship data
- Business development intelligence and research
- New business pursuits
- Marketing lists and events
- Matter experience tracking

One capability that makes legal360 unique is its ability to easily integrate with other legal industry software tools to provide a 360-degree view of the client. For example, Foley’s matter descriptions and profiles are integrated from their Elite practice management system, which has allowed Foley to streamline their process. legal360 is also integrated with the firm’s Concep e-Marketing tool and UltiPro payroll system to share important client, contact, and employee data across the Business Development and Marketing departments.

## A new era of business development success

Through the implementation of legal360 and Microsoft Dynamics 365, Foley has realized the following benefits:

- Achieved real-time visibility of who’s pitching who, for what, and what the outcome was, which has reduced collisions among practice groups pitching the same client.
- Enhanced visibility of contacts and relationships to better understand who knows who and who’s working with who, to more easily facilitate cross-practice introductions.
- Gained a searchable, reportable centralized repository of pitches and proposals, which has reduced administrative time and overhead.
- Improved tracking and reporting of marketing events to quickly see who’s been invited and who attended.

The value to the firm has been significant. “I’ve worked with the legal360 team for 15 years now, and they are fantastic,” describes Gregory. “The product is great - it’s extremely flexible and can be tailored to the unique needs of our firm, which is critical for user adoption.”

Foley remains excited about the additional future possibilities that legal360 brings to the firm. “We’re evaluating implementing the ERM tools for automated data capture, deploying more sophisticated features around relationship mapping and intelligence, and expanding our use of the dashboarding tools,” explained Gregory. “legal360 gives us the ability to turn on these new capabilities when its best for us, which is something we value tremendously.”

## Let’s Talk

info@360sg.com

www.360sg.com/legal360.com | Americas: +1 770-744-4415 |