Law Firm Transforms Marketing and Client Service with Microsoft Dynamics CRM

Established in 1759, Edinburgh-headquartered Dundas & Wilson has offices in London, Glasgow, and Aberdeen. With almost 400 lawyers, the firm focuses on providing legal advice to the financial services sector, the public sector, and commerce  
and industry.

**Results:**

* Improved service to clients
* Better and more effective marketing
* Improved internal efficiencies
* Better information sharing
* Improved management, practice and fee-owner knowledge

**Industry:**Professional Services

**Country:**  
United Kingdom

**Number of Users:**  
400

**Dundas & Wilson  
Technology Environment:**

* Microsoft Dynamics CRM 2011
* Microsoft Outlook 2012

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*“Client and contact information was scattered around the business, with the marketing department and individual lawyers having their own databases. Now, we have a single, central view—which is far more efficient and effective.”*

Tom Clowes, Head of Programme Management, Dundas & Wilson

At leading UK law firm Dundas & Wilson, a fast-changing legal landscape had thrown the effectiveness of its client-facing IT systems into sharp focus. At a time when the firm needed to be fully leveraging its contact and client base, its systems for doing so were antiquated and inefficient.

“Client and contact information was scattered around the business, with the marketing department and individual lawyers having their own databases,” explains Tom Clowes, head of programme management at Dundas & Wilson.

And while such inefficiencies had been tolerated in the past, a tougher economic climate—and a changed legal marketplace—meant that finding an alternative approach was vital.

Thanks to the economic downturn, certain lines of business activity were contracting. Corporate clients too, were increasingly requiring the firm to work to fixed budgets. And better collaboration between law firms was becoming a requirement, with fixed-duration ‘panels’ becoming commonplace.

For clients—especially large corporate clients—the focus was on developing a single, firm-wide client ‘view’, detailing the key client relationship holders, marketing activities, billing profiles, on-going work and current opportunities.

Dundas & Wilson called in Microsoft Gold Certified Partner eBECS to help identify the best solution for its needs. The answer: Microsoft Dynamics CRM, tightly integrated to users’ existing—and familiar—Microsoft Office Outlook desktops.

Results

Ease of Use

Thanks to the tight integration between Microsoft Dynamics CRM and users’ familiar Microsoft Outlook desktops, everyone at Dundas & Wilson has ready access to the data they need—without having to switch systems, or learn new skills.

Tom Clowes, Head of Programme Management at Dundas & Wilson explains:

*“The lawyers live in Outlook, and work in Outlook, and now we’re seeing the benefits of tight integration between Outlook and Dynamics CRM –with minimal training for new users. Lawyers use the familiar Microsoft Outlook interface, and in most cases take less than an hour to get started.”*

With Microsoft Dynamics CRM, Dundas & Wilson has been able to improve its marketing, improve its client service, and improve its internal efficiencies and controls, says Clowes.

Improved service to clients

The firm’s 400 lawyers now have comprehensive client data at their fingertips, “Internally, across our various practices, we’re now much better informed about the work we’ve done for individual clients, and about who within the firm has been working for them,” Clowes says. Client-service leaders too, have a 360-degree view of practice initiatives, accessing views across different areas of practices, ensuring a co-ordinated approach for clients.

Better and more effective marketing

“Business development staff can use Microsoft Dynamics CRM to track the progress of a tender, keep tabs on contacts, and keep in touch with prospective clients,” Clowes explains. And the marketing team can manage multi‑client events, the budget for which might be drawn from several departments. Finally, it has become much easier to identify opportunities for clients to benefit from other services from the firm.

Improved internal efficiencies

With Microsoft Dynamics CRM workflows and automation, the firm can efficiently achieve such tasks as updating client details, creating mailing lists, and notifying employees of changes in the status of a client. “The tight integration between Dynamics CRM and Outlook means that Dynamics CRM is how we hold client and contact data, but Outlook is often how we publish that data,” says Clowes.

Better information sharing

Lawyers can use the software to store and access client information held by different departments, ensuring that information on panels, events, opportunities and tenders could be shared. “With one single source of client and contact data, duplication and potential errors have been eliminated—and access to information is faster and more efficient,” says Clowes.

Improved management information

Now, says Clowes, it is easier for Dundas & Wilson to monitor and view KPIs by practice area, client, sector, contact or fee-earner. “Pulling up a consolidated view of key information adds value to our fee-earners and clients alike. We can instantly see the billing position of an account, who manages the account, who in the firm knows who at the account and what meeting and events have taken place with those contacts and which of our lawyers have worked with them.” On an ongoing basis, personalised dashboards and reports add to the degree of control and efficiency.

Next Steps

For more information about Microsoft Dynamics, go to:  
[www.microsoft.com/dynamics](http://www.microsoft.com/dynamics)

* [Connect with Microsoft Dynamics](http://www.microsoft.com/en-us/dynamics/erp-nav-overview.aspx)
* [Become a Dynamic Business](http://www.microsoft.com/en-gb/dynamics/dynamic-business.aspx)