DESIGNING A MARKETING INFORMATION SYSTEM

by **Sally J. Schmidt**

Computers have been helping law firms in the areas of billing, case management, research and docketing for many years now. But one of the best uses of computer technology has gone virtually undeveloped: Marketing information systems. A marketing information system (MIS) is a way of organizing marketing-related data to generate reports, track important data over time, and provide attorneys with useful information for their business development activities.

What does an MIS contain? It can include any or all of the following:

* Attorney information, such as: areas of expertise; schools attended; languages spoken; articles written; activity in community, professional or civic organizations; etc,

* Client information, including: name and address, for mailing purposes; business or industry; areas of practice used or with potential; and, source of the client.

* Prospect information, such as: products or services; industry; needs; existing law, accounting or banking relationships; financial information; etc.

* Information on referral sources and other important "publics" of the firm.

USES OF AN MIS

The products of a marketing information system are generally lists or reports. For example, a firm can generate lists of:

* Attorneys, listed by law schools attended.

* Articles written by firm lawyers, grouped by area of law.

* Specific areas of expertise and the lawyers who practice in each area.

* Referral sources, organized by location and specialty.

Reports from the MIS can also be very useful, such as:

* Charts showing client case intake over five years.

* Reports on the top ten clients of the firm, over five years' time.

* Pie charts demonstrating client industries over time.

The firm can circulate these lists and reports to the attorneys to assist them in their marketing, cross selling or client service efforts. Some firms combine this information into a marketing handbook or directory for each lawyer. Lawyers are invited to update their information quarterly, and then new pages are routed around the firm. In firms where attorneys are "on line," the lawyers can access or print out lists, reports or resumes as needed.

What is the advantage of organizing marketing information into a database system? Each type of information has its own reward. For example, as the legal profession becomes more competitive, it is increasingly important to track sources of referrals, and reciprocate. If lawyers in the firm need to refer a matter--to an accountant or out of town attorney, for example--they can find someone in their reference materials who not only has a contact in the firm, but has been a source of business for the firm in the past. As another example, by coding client and non-client lists, attorneys can request lists (or mailing labels or personalized letters) for any number of categories: by each attorney (for holiday cards); by clients who have had a tax matter handled by the firm (for a tax newsletter); by clients or others in the real estate industry (for a related seminar); etc.

HARDWARE AND SOFTWARE

The ideal MIS will be integrated with financial and billing information, so data, such as client revenue or areas of law used, does not have to be entered twice. This technology is woefully lacking, however, so for now most firms have to settle for a separate MIS with some duplication of effort.

One law firm has been successful in putting its MIS on its Wang word processing system. It has the capability of coding and sorting by numerous fields, such as those described above. Another firm used dBase III software to set up its marketing information system on a personal computer. The P.C. was hooked up to the firm's word processing system, so the information could be used to create letters and labels. Finally, for those firms facing a computer conversion, it is advisable to think now about what marketing related information will be useful, and how it will be collected and organized.

DATA COLLECTION

No marketing information system will work without good data to process. In a law firm, this is the difficult part, for creating an MIS requires that the lawyers provide information about their clients, their contacts and themselves. How can a firm collect this information?

The first key is a new client/matter form which requires attorneys to indicate the client's:

* Industry (SIC codes can be used)

* Source (how did the client come to the firm?)

* Practice areas to be used (using codes)

* Potential practice areas for the future

This is also the time to have lawyers indicate if the client should be put on a mailing list (once again, coded to receive announcements, newsletters,

holiday cards, pocket calendars, etc.) This client information alone can generate a multitude of lists and reports over time.

The second key is a questionnaire for the lawyers, asking them to list the background information in which the firm is interested, such as:

* Undergraduate or graduate degrees

* Clerkships or law honors

* Other employment or teaching positions

For new lawyers, it is easy to get this information by giving each a questionnaire to complete and return as part of their orientation. For those lawyers already in the firm, however, it is more difficult. Some information can be obtained from Martindale-Hubbell listings; other parts can be gleaned from resumes or CVs. At some point, however, each lawyer must review his or her biographical information to approve or supplement it.

It is recommended that the firm circulate the biographical information to each lawyer at least semi-annually for review and update. In this way, attorneys will be less likely to forget presentations made, articles written, or other information to add to their biographies.

CONCLUSION

One of the keys to effective marketing is good information. Whether a lawyer is prospecting, cross selling or making decisions about services or activities, it is important to have up to date information on the past performance of the firm.

A marketing information system is not easy to develop. Realistically, it may take several years to have all the pieces in place. Bur firms can start immediately by collecting the necessary data, and working with the existing system to produce information on a regular basis for the lawyers.

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