

## Lupton Fawcett invests in relationship intelligence to increase client satisfaction and realizes a 350% return on investment

Lupton Fawcett is a commercial law firm with offices in Leeds, Sheffield and York. Given its dedication to surpassing expectations, Lupton Fawcett has created a diverse team of 280+ passionate experts with a refreshing take on the full spectrum of commercial and personal legal services. In 2018, the firm sought a relationship intelligence platform to accelerate cross-firm collaboration and key account client experience management.

Since deploying Introhive, Lupton Fawcett has seen a 350% return on investment in the first nine months.

### Business Challenge

As a full service law firm, Lupton Fawcett is always seeking new and innovative ways to better support their client base. The firm had three core business objectives tied to growing serviceable revenue and enhancing client experience management:

#### 1. Discover gaps in their client service model:

Lupton Fawcett needed to understand the gaps of services they provided to their current clients and determine how to strategically approach each key account based on firm-wide relationships.

#### 2. Map client relationships for succession planning:

Lupton Fawcett needed a better way to manage succession planning to support retiring members, including assigning the appropriate partner to take on clients and ensuring the retiring partners are properly onboarding their colleagues to their client base.

#### 3. Improve technology adoption and lasting change management:

To help better realize the value of a firm-wide database, the CRM needed to have accurate, updated information, but lawyers did not have time to focus on data entry. Lupton Fawcett needed a way to automate the process of capturing contact, account and activity data to drive change management and break down cultural barriers to encourage cross-firm collaboration.

“Every business needs a contact management system in order to better understand your client base and your relationships with them. Unless you exist in a utopian environment where your people are all delighted to manually key information into a CRM system, you need a solution like Introhive that automates important data collection. It takes all the heavy lifting out of the process for professionals. From an investment perspective, it’s a no brainer.”



**NEIL CORMACK**

Head of Business Development & Marketing, Senior Associate

# The Solution

Introhive’s AI-powered data automation and relationship intelligence solution was deployed to support Lupton Fawcett’s Microsoft Dynamics CRM system. The integration of these two systems enabled the firm to quickly improve CRM adoption, accelerate cross-sell and upsell opportunities, and better manage their succession planning for key client accounts.

## The specific solutions deployed include:



Introhive’s Contact and Activity Sync was deployed to efficiently map missing contact and activity data from email to MS Dynamics, eliminating manual data entry for lawyers and staff



Firm-wide relationships were mapped and scored in CRM to improve visibility into client coverage and collaboration on key accounts



Client engagement scoring, activity tracking and relationship trend line analysis was deployed on key accounts to better manage and exceed clients’ expectations



Pre-Meeting digest reports were dynamically prepared and automatically distributed to professionals prior to client conversations to enhance meeting preparation

“As a Law Firm, time is money. Introhive allows our fee earners to both keep their contacts up to date in our CRM system while reducing the amount of time and effort required to do this. We are saving, on average 3-4 hours a week of what would otherwise be lost chargeable time per fee earner.”



**JAMES HOOD**

Head of Information Technology (IT)

# The Results

In the first year with Introhive, Lupton Fawcett has seen a remarkable increase in their CRM adoption and practitioner productivity, resulting in the following outcomes:

**350%**

ROI from data automation alone

**220%**

Increase in CRM contact data accuracy

**675+**

hours saved by automating pre-meeting research

**440+**

hours saved by attorneys by automating data entry

**22,000+**

Total contacts enriched with more accurate data within CRM

**213%**

Increase in activities synced to CRM

Since deploying Introhive, Lupton Fawcett has been able to efficiently increase the volume of accurate relationship data in Microsoft Dynamics. Additionally, they have been able to accelerate change management and better encourage cross-firm collaboration.

With Introhive's solution, Lupton Fawcett is progressing its goal of representing the full suite of legal needs for each its clients, while eliminating unproductive administrative time for its lawyers and staff. Overall adoption and utilisation of it's Microsoft Dynamics deployment has never been higher.



**JAMES HOOD**

Head of Information Technology (IT)

"I absolutely recommend Introhive for any firm that has an established CRM and your struggling with system adoption and the cultural shift required to maintain accurate data quality. Introhive is definitely that perfect overlay to make sure that you're not just collecting the right information, but also ensuring that data stays clean over time. Providing a solution that's pretty much plug and play."



**NEIL CORMACK**

Head of Business Development & Marketing, Senior Associate

"Working in a law firm, our people are naturally reluctant to log information in our CRM. Introhive has revolutionised our approach through the way in automatically harvests information into our CRM and presents it in a very useable and useful way. It is a great product, it is constantly being refined and improved."