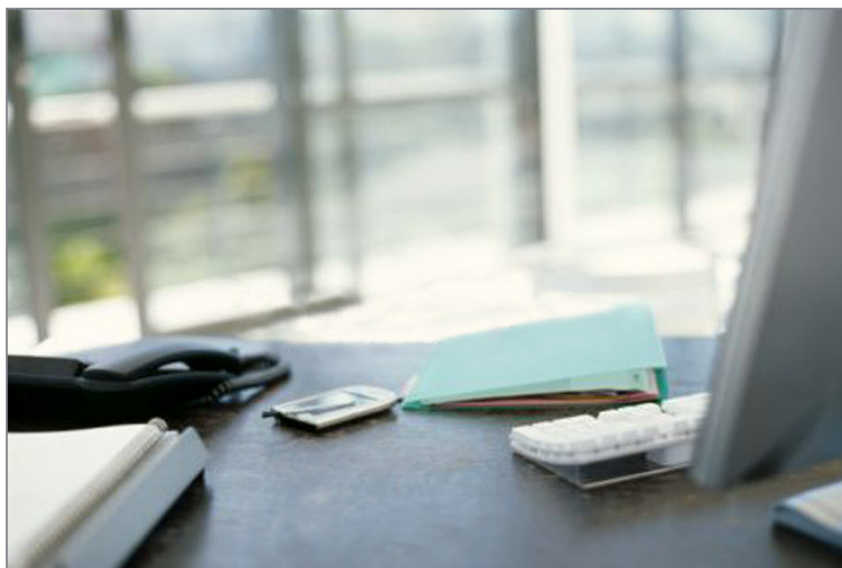


Ozannes implements Contact Manager to automate and drive business development forward

CASE STUDY

“Structurally it has simplified our day-to-day business development and marketing efforts. The database is easier to operate and manage.”

PIP BOWYER
Head of Business Development and Marketing
Ozannes



The recent implementation of Contact Manager, the specialist legal customer relationship management solution from Hubbard One, has laid the foundation for Channel Islands law firm Ozannes to significantly improve its strategic business development efforts.

The firm, which is about to merge with fellow Channel Islands firm Mourant du Feu & Jeune, decided to implement the system after it purchased Elite 3E®, the advanced financial and practice management solution from Hubbard One's sister company Elite.

Ozannes' Head of Business Development and Marketing, Pip Bowyer, says having opted for 3E, selecting Contact Manager was a logical choice. "We knew Contact Manager was a robust, full function CRM system and one of our key desires is to integrate the system with our financial solution. The joint offering of Elite and Hubbard One should provide us with an integrated platform for communications and reporting."

Bowyer says such a platform would be a great leap forward for the firm which previously managed its CRM efforts using a basic database.

"Our legacy solution was not integrated with our financial system, which meant we couldn't unearth key financial data to discover exactly who our top performing clients were."

The desire to unlock that data and furnish the firm's business development and marketing efforts with detailed information about its most profitable clients was a key project objective. "We also wanted a system that could streamline and improve the quality of the communications we delivered to clients. Using Contact Manager and Hubbard One's Email Marketing solution, we will be able to automate our e-mail delivery and provide the slick front-end we are looking for."

When Ozannes merges with Mourant it will become by far the biggest Channel Islands' law firm and the third largest offshore firm. Bowyer says the merger has highlighted the need for a powerful business development platform.

"Our ultimate aim is to be very client-centric. We want a system that has good control over client data and that provides us with enough flexibility to slice and dice that data according to our tactical marketing efforts. Mergers are often confusing for clients and we are going to use Contact Manager to ensure we present consistent, on-brand communications so the transition is as seamless as possible."

Bowyer says once the system is integrated with 3E, the analysis of key clients will inform the strategy and tactical delivery of the firm's business development efforts.

"We haven't been able to operate a tiered client communications programme before this and we want to use the Hubbard One system to progress that. We want to identify key clients and discover both new and incremental business opportunities – and build specific marketing programmes and services around those opportunities."

Bowyer says although the firm is still bedding in the system, Contact Manager is already providing a number of time- and labour-saving benefits.

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Ozannes went to a great deal of effort cleansing its existing data before converting it over to the new Hubbard One system. Bowyer says the firm's legacy data was in a less than ideal state, as the controls over the way information was being entered had broken down over time.

Says Bowyer: "The conversion work was intensive to begin with, but now we have clean data in the new system which means the ongoing data management is going to be a lot smoother. We have already seen a positive change. The system makes it easier for our fee-earners and secretaries to keep information up to date, and the better the data we have, the more finely tuned and effective our business development efforts become."

Integrated seamlessly into Microsoft® Outlook®, Contact Manager makes it simple for lawyers to input and update client information. Bowyer says user buy-in to the system has been extremely positive.

"While there is always a period of adjustment to a new system, the uptake has been very good. Our lawyers understand that if they don't engage in a proactive way they won't be able to extract the information they need down the track, which means their clients won't be well served."

This is where the 'adding value' chain begins, says Bowyer. "We have no chance to add value if we don't have the data to interrogate. I think our lawyers have been quick to realise that. It helped that the project was heavily supported by management. Our Managing Partner played a crucial role in communicating the benefits we hope to realise from the system, and lawyers can see there will be advantages to them personally if they actively engage in the process."

Along with email marketing, Ozannes will also integrate Contact Manager with Hubbard One's web forms product. This allows the firm to establish data capture forms on its websites, and will simplify event management.

"We will be able to capture RSVP information and handle online payments which should make our event management processes a lot slicker," says Bowyer. "We will also save time and money by sending out invitations via email rather than hard copy. We will be able to create it all in-house and dispatch it for minimal cost."

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The system is already providing significant advantages when it comes to managing client lists. Prior to using Contact Manager, hard copy invitation lists went round to lawyers and they added or deleted names, says Bowyer.

"This wasn't particularly time- or cost-effective. With Contact Manager we can now publish a list online and lawyers can access it through Outlook, and quickly add appropriate names or subtract names that shouldn't be there. The list information is now retained and reused when a similar event is planned again. The lists now evolve rather than being made from scratch each time."

Bowyer says she sees huge potential in the system. "Once we have 3E installed and fully integrated I can see opportunities for us to provide more holistic client service, be it in offering general services such as legislation review, or legal services targeted to clients in specific business sectors."

ABOUT OZANNES

Ozannes is a law firm with an established history, a modern, dynamic approach, and an international reputation for professionalism and excellence. It takes great pride in being at the forefront of the legal profession in the Channel Islands. Although it originated in Guernsey, Ozannes also has a significant presence in Jersey and is in an ideal position to provide its corporate and private clients with first-class, integrated legal services across all practice areas.

Ozannes' core business is advising on international financing and investment transactions – in particular, mutual funds, limited partnerships, captive insurance, mergers and acquisitions, securitisations, trusts, employee benefit schemes, protected cell companies, stock exchange listings and all forms of litigation and dispute resolution and property-related matters. For more information, visit ozannes.com.



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