

## End-of-Year Strategies for Successful Contact Management

Article By:

Christina R. Fritsch JD

---

As the year draws to a close and the festive season brings new networking opportunities, it's an ideal moment to reflect on the importance of contact and relationship management, especially for new attorneys joining a firm. This period is a crucial time for focusing on marketing and business development, leveraging the season's spirit of connection and reflection.

Despite the assumption that lawyers naturally excel in relationship management, our experience as CRM success consultants tells a different story.

We've trained thousands of attorneys, revealing diverse and often unstructured approaches to contact management. From reliance on mobile devices and emails to the use of platforms like LinkedIn, attorneys today manage their contacts in various ways, often outside centralized systems.

The shift in contact management practices isn't solely a

generational trend. Seasoned attorneys are also adopting diverse methods, influenced by:

- ~~What are the biggest challenges for law firms in adopting CRM systems? How can law firms overcome these challenges?~~

Regardless of the varied methods, the challenge for law firms remains: maintaining a centralized, accurate and complete contact database is vital for effective marketing and business development. This centralized approach also addresses security concerns of having contact information outside firm-approved systems.

To tackle this challenge, firms must first understand the extent of the issue, analyzing which attorneys actively share contacts in the CRM system. Solutions may vary, from targeting just a few younger associates to addressing a broader group.

Changing behavior is the bigger challenge, requiring a demonstration of tangible personal benefits, not just advantages for the firm. Lawyers must be convinced that formal contact management offers substantial personal and professional benefits.

In the spirit of year-end reflection and preparation for fresh starts, here are 10 top tips for effective contact management:

10  
9  
8  
7  
6  
5  
4  
3  
2  
1

~~1. Careful benefits assessment and investing time in them can yield  
2. Successful law firms can understand effective communication success.  
3. Systematic identification of data points will help identify current  
4. Shareholder makes calling and data visits with you and contacts.  
5. Data analysis helps in maintaining and strengthening  
6. On-site call out pays to relationships. Of the most crucial aspects~~

Effective communication and training are key to imparting the importance of these practices. Regular outreach and instruction, particularly for new associates and lateral hires, can emphasize the long-term value of centralized contact management. Once attorneys realize the ease and benefits of efficient contact management, most are likely to embrace these practices, especially during this reflective holiday season.

© Copyright 2024 CLIENTSFirst Consulting

---

National Law Review, Volumess XIII, Number 333

Source URL: <https://natlawreview.com/article/end-year-strategies-successful-contact-management>