CLIENT SENSE

This platform is designed for managing and tracking key client and referrer relationships.

PETER MORAN

Which practitioners would find this technology useful?

Law firms looking to adopt a firm-wide client relationship management (CRM) system for managing and tracking key client and referrer relationships.

How does it work?

Client Sense automatically pulls data on selected clients and referrers from a range of sources including the business' websites, a firm's Outlook system (whether via Office 365 or Microsoft Exchange) and the firm's practice management system. That data will then be automatically updated based on activity within the firm. Interactions between individuals such as emails to and from and also meetings entered into calendars will be tracked. Signatures contained within emails can also be analysed and relevant information added to the Client Sense database.

A wealth of information can then be presented in various forms. For example, data on a particular client can be broken down so that a relationship partner can see lists of the number and names of employees at the client known to the firm, the number of people within the firm dealing with people at the client, the number of interactions between those people, the amount of hours of interactions, contact details, titles etc. This information allows for key client relationship mapping and development of more sophisticated CRM plans and strategies. Clients can be assigned to individuals and times and reminders set for ensuring contacts occur with key client relationships.

All this data then updates in real time as the systems, eg, the email and practice management systems, are used for interacting with clients. For example, as a meeting with a client is set in an Outlook calendar, the details of that meeting are added to the Client Sense database and against that particular client.

A further dashboard view is from an individual lawyer's perspective which shows key relationships and a traffic light system for who needs to be kept in contact. Contacts will receive a red, orange or green rating by way of flagging to the practitioner which relationship needs to be their priority at any given time.

Benefits

A core benefit of Client Sense is the ability to set notifications that are provided to individuals without having to log into the Client Sense system. Similarly, a practitioner can choose to have a pre-meeting report sent to them before a meeting which sets out an amount of information relating to the person they are meeting with, such as previous contacts with that person and other contacts within the firm.

Perhaps the key benefit of Client Sense is that, rather than a mere database which may or may not be accurate, Client Sense can ensure that a client or referrer can genuinely be "known" to the firm. Because data is updated in live time as interactions occur, the data will always be current and accurate. And, the extent of the data captured means that a significant amount of visibility is provided.

Costs

Pricing is according to the number of staff in a firm and starts at around $300 per month for a firm of up to 10 people.

Risks

As Client Sense is not a cloud system, any data captured is generally already within a firm's environment and subject to the same levels of security. Much of the data captured is unlikely to be sensitive, however, as practitioners can make notes against client files, access to Client Sense still needs to be protected such as through passwords. Information from Client Sense can be shared out to mobile phones but if firms are protective of information leaving their server environment, such mobile functionality can be limited by Client Sense.

Downsides

As with most CRM systems, Client Sense will only be as valuable as the user makes it and is not a panacea to client relationship management. Practitioners will need to actually incorporate Client Sense's processes, such as the traffic lights, into their own habits and practices in interacting with clients. ■

Peter Moran is managing principal at Peer Legal and founder of the Steward Guide, an online technology guide for lawyers (www.stewardguide.com.au).

SNAPSHOT

What is Client Sense?
A client management platform for professional services firms

What type of technology?
Software installed via on-premises or virtual server (hosted option also available)

Vendor
Client Sense Pty Ltd

Country of origin
Australia

Similar tech products
Nexl
Introhive
Practice management software with CRM systems
Excel spreadsheet

Non-tech alternatives
Diary and address book

More information
www.clientsense.com