

## Customer Uses BranchIt To Locate 400,000 Relationships and Turbo Boost Its CRM

**“We’re using BranchIt to build out and increase the accuracy and effectiveness of our CRM system. As a result, it has helped us improve client satisfaction as part of our Key Client Program.”**

– Matt Ritter, Marketing Manager, Woodcock Washburn LLP

### BACKGROUND

Woodcock Washburn LLP has specialized in intellectual property (IP) law since 1946. The firm has been rated as one of the top IP law firms in the United States by IP Law & Business, providing national and international clients a full range of services. Woodcock Washburn has grown to nearly 100 attorneys and 260 employees in total.

Woodcock Washburn prides itself on providing personal service and trusted advice to clients across a wide range of industries and technologies. Many of the firm’s clients have been with Woodcock Washburn since the company’s founding. The firm recently initiated a high profile project providing extra value-added services to key clients. A large goal of the “key client program” is to facilitate communication between the firm’s various legal practice areas and institutional clients, ensuring accurate and relevant information is provided at the right time, leading to new business opportunities.

### THE CHALLENGE

The marketing department spearheaded the key client program for Woodcock Washburn. The focus of the program is to provide top-notch client services and timely, relevant customer communication.

The key client program requires information on the client: current contact information, legal areas of interest, and practice areas in which the firm has been employed. Woodcock Washburn uses a client relationship management (CRM) system which should contain all client contact data; however the completeness and the accuracy of the data in some cases is questionable.

As Matt Ritter, Marketing Manager, explains “It’s easy to let your CRM get out of date if someone is not watching it. People leave corporations, lawyers go to other firms. Unless someone is there to catch that and let you know of the change, changes go unnoticed in a lot of cases.” In addition to employee turnover, common reasons a CRM might not maintain current information include a corporate move, merger or acquisition, personnel promotions, or poor data entry. The key client program highlighted the critical need for up-to-date contact and relationship information.

### THE SOLUTION

BranchIt provides Matt with the right tool to ensure Woodcock Washburn’s key client program is on course. BranchIt helps uncover and update contacts with whom the attorneys have relationships. BranchIt is now part of a consistent and efficient process used by the law firm to maintain their CRM.

With BranchIt, the frequency, evenness, and recency of correspondence are assessed in order to help a user determine the relative strength of relationships with each contact. Evenness of communication references the amount of two-way dialog between individuals. For example, significant one-way

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communication might indicate unsolicited email communication, whereas two-way communication implies a true connection has been made. Recency of correspondence provides an important indicator of whether each relationship is current, and also validates the accuracy of a contact's email address.

"The way we're using BranchIt at this time, is to build out and increase the accuracy and effectiveness of our CRM system. Basically, the CRM holds all of our client contact information, and shows relationships between our clients and the attorneys here at Woodcock. ... One aspect of the key client project is to make sure we have all points of contact up-to-date and accurate, and we know who of our clients we're in contact with the most. BranchIt is the tool we use to make sure this aspect of our key client program is on track."

Prior to BranchIt "there would be a lot of legwork to obtain updates. BranchIt makes it much more efficient to get a project done. It's hard to put a time span on it. Without BranchIt, it could be weeks or months longer ... You have to contact each administrative assistant or attorney and are subject to their schedules. You're really at the mercy of when someone is able to get back to you. With BranchIt you can be the one in control of the project."

## RESULTS

Matt explains how Woodcock Washburn has benefited from uncovering employee relationships and keeping them up-to-date. "BranchIt has allowed us to significantly increase the number of contacts we have in our CRM". After implementing BranchIt, over 459,000 contact relationships were captured for the firm of 100 attorneys and approximately 260 employees. Each of those relationships represents a potential business contact to whom the firm can be introduced.

Marketing efforts for the key client program are focused on reaching out to clients and strengthening relationships. Having accurate contact data is the first and critical step in effective marketing communication. With BranchIt, the law firm is able to ensure they reach "the right people with our external communication," whether for a brochure, client alert or announcement, or event invitation.

Beyond the marketing department, the business development team has been extremely pleased with the results obtained using BranchIt. "They were impressed with the amount of information I was able to pull in a short period of time" said Matt Ritter. "I can pull together a list in a matter of minutes. The BranchIt tool makes it really easy to get this data." Performing queries to search for company contacts without BranchIt would have been tremendously time intensive.

Having worked at a large general practice law firm prior to Woodcock Washburn, Matt recounted that larger firms often have entire teams within a marketing department dedicated to the upkeep of data in their CRM system. BranchIt helps Woodcock Washburn save time, focus on strategic efforts, and use resources more efficiently. Importantly, the quantity of relationships has also increased. "BranchIt has allowed us to significantly increase the number of contacts we have in our CRM." says Matt.

## SIMPLY EASY TO USE

In addition to providing time savings, accurate information and identifying relationships, BranchIt is simple to use. "Anyone, at any level within marketing could use the tool, and use it effectively" says Matt. Individuals familiar with search engines or the Internet in general would be familiar with conducting a search within BranchIt. Adds Matt, "One of my favorite things about BranchIt is the comprehensive results you get. Ease of use and detailed information is what I like best."

## ABOUT BRANCHIT

Based in Sunnyvale, CA, BranchIt Corporation is a leading provider of relationship discovery solutions. Through its patent-pending, permission-based, on-demand software, BranchIt enables companies to leverage the collective strength of the relationships held by their employees to grow sales, develop strategic partnerships and drive business objectives, while preserving security, privacy and integrity of information. The BranchIt solution requires no software installation, upgrades or maintenance. For more information, please visit [www.branchitcorp.com](http://www.branchitcorp.com), or call 1-866-WARM-LEADS.

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