BRANCHIT℠
GROW YOUR BUSINESS

BranchIt Helps Customer Uncover 500,000 Relationships and Win New Clients

"We love BranchIt because it has increased the number of contacts we have by 2500%, identified the right relationships on which to focus, and helped us win business and new clients."

–Monica Jalil, Marketing Director, Ross, Dixon & Bell, LLP

BACKGROUND

The law firm Ross, Dixon & Bell, LLP was established in 1983, and is recognized as one of the best firms for insurance and complex litigation in the country. The firm has a strong institutional client base, with whom they have had long standing relationships. The firm has 120 attorneys, and 300 lawyers and staff combined.

Ross, Dixon & Bell, a premier law firm in professional liability and commercial litigation, was planning targeted communication to existing and new clients to acquire additional business. The firm did not have immediate plans to purchase a client relationship management (CRM) system due to the resources, costs and commitment required to make it a success. The firm's contacts and the associated contact information resided in a series of outdated public folders in Microsoft Outlook.

THE CHALLENGE

For each new business development initiative, the firm required an understanding of existing relationships with attorneys at Ross, Dixon & Bell. The firm's marketing department was tasked with uncovering those connections.

It was common for the marketing department to spend many hours, and often days, exploring and delving into various systems in search of pertinent client or prospect contact information. At the time, this information was contained across a series of 200 public folders in Microsoft Outlook, as well as a master marketing list contained in Microsoft Excel. Often the information in Microsoft Outlook was obsolete, an attorney had not added sufficient information to the folder, or a secretary had not updated the system. In addition, attorneys routinely sent blanket emails across the firm inquiring whether anyone knew a particular individual at a specific company. The tasks of helping Ross, Dixon & Bell identify who they knew and understanding the existing relationships were "a very daunting process" according to Monica Jalil, Marketing Director.

THE SOLUTION

Ross, Dixon & Bell maintains a client relationship management strategy with threefold goals:

- Identify existing client relationships
- Incorporate client relationships into business development initiatives
- Improve the process for implementing marketing initiatives

The firm viewed implementation of a traditional CRM system as an extensive process, requiring a large amount of resources in both time and money. Instead, Ross, Dixon & Bell decided to employ BranchIt to support its strategy goals. According to Monica, "The process for rolling out BranchIt

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is amazing. Truly a 5-minute process where someone in the IT department flipped a switch, and we were able to see instant results."

Monica elaborated on the decision to select BranchIt, "Choosing BranchIt was a very easy decision. There is really no other option that comes close to providing what BranchIt does in terms of service and immediate value."

RESULTS

The value of relationships in developing business cannot be overstated. With BranchIt, the firm has seen its number of contacts multiply 25-fold. Ross, Dixon & Bell repeatedly wins new business using BranchIt.

Monica provides the details: "The historical data that BranchIt reviews allowed Ross, Dixon & Bell to turn on the system and immediately have 500,000 contacts and see value right away. We had only 20,000 contacts before BranchIt. After BranchIt was in place we were able to increase the number of General Counsel contacts in our system by 700%, which is phenomenal. No other system out there was able to show that they were able to provide the same results that BranchIt could provide." Plus, each of the contacts BranchIt uncovers is connected to one or more Ross, Dixon & Bell employees, and therefore represents a current relationship and an opportunity to connect to new business.

Prior to having BranchIt, the marketing staff at Ross, Dixon & Bell would spend approximately 30 hours to gather intelligence required for a single new client proposal. With BranchIt, Ross, Dixon & Bell has cut the required preparation time by at least 50 percent. If one business development initiative saves 15 attorney hours at an average of $500/hour, it is equivalent to a $7,500 savings per proposal in attorney effort alone.

Monica recalls an example where BranchIt helped secure more business. A Ross, Dixon & Bell employee used BranchIt to conduct a search for potential clients for plaintiff-side class action antitrust suits by industry and geographic location. While searching for a particular type of manufacturer, the employee identified an office manager in another Ross, Dixon & Bell office that had served on a Board two years prior with an executive who had worked for a potential prospect. BranchIt's review of historical data allowed the employee to identify the office manager relationship, contact the executive, and put an attorney in touch with the executive.

According to Monica, "Without BranchIt in place we would not have been able to identify that relationship. First, no one would have known to reach out to an office manager in another town to ask for input on finding clients in manufacturing companies. Second, the office manager had served on the board with the executive two years earlier and I don't think she would have known to mention that relationship, it wasn't top of mind for her. Third, since the office manager was not an attorney, her contacts would never have been in a law firm's CRM system. Without BranchIt, I don't think we would have ever identified this information." This information is what won Ross, Dixon & Bell the business.

QUANTITY AND QUALITY

In addition to helping Ross, Dixon & Bell identify its contacts and relationships, there is tremendous appreciation for BranchIt's ease of use, simplicity of installation, and quick time to get up and running. Monica expresses her approval, "I love BranchIt because it's quick and easy. It gave us access to information Day One that we didn't have otherwise. We have won business because of information we have been able to find in BranchIt. But mostly, I love BranchIt because of their customer service, which has been phenomenal."

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, or call 1-866-WARM-LEADS.

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