

## Bilzin Sumberg embraces strategic data management to gain real-time intelligence

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Paul VanderMeer, Chief Knowledge Officer, Bilzin Sumberg

**US law firm Bilzin Sumberg tailors its services to each client's individual needs and prefers to build enduring client relationships. The firm believes that data management innovation and technology are essential tools for understanding client experiences and delivering service excellence.**

In order to improve the utilization and ROI of its CRM system, Bilzin Sumberg engaged Harbor's data integration specialists to help it create a robust competitive intelligence and knowledge management strategy.

Paul VanderMeer, Chief Knowledge Officer, Bilzin Sumberg, has responsibility for delivering the technology to meet that strategy. He says Harbor was recommended to the firm by one of its clients, who was delighted with the work they had done for them.

"We started with a relatively simple project to create some event management reports, but it became clear to me very quickly that the team at Harbor could be critical in helping us with a whole range of needs."

### **Data audit fundamental to success**

Following the success of the initial reports, Harbor was asked to make a detailed analysis of the firm's data related to its CRM system.

The Harbor project team understood the importance of leveraging passive data management and integrating data sources to uncover actionable information. It installed several tools that allowed Bilzin Sumberg to automatically analyze and score the data so the firm could focus its effort on the most important clients and contacts.

Harbor has a proprietary approach to consolidating, scoring and tiering data, including an extensive library of tips and tricks and tools for cleaning up data.





## CRM in the fast lane

Martyn Balham, CRM Technical Consultant, Harbor, worked on the data scoring analysis and says there is a temptation to use CRM as a firmwide address book.

"And while systems offer that facility, the firms who really succeed are those that understand how to implement a focused approach to managing data and who use the integration and reporting to drive the capture and management of that information."

Most recently, Bilzin Sumberg has implemented ScoreCard Reports and League Tables, which take snapshots of the data and "gamify" the results. These reports give the assistants incentive to work with their attorneys to provide the information the firm needs to drive business intelligence.

"One of the things that I appreciate about working with Harbor is that they think creatively to help you achieve your goals," says VanderMeer.

"They have the depth of experience to make big ideas achievable. It's not about selling you something new; it's about utilizing the resources and tools you already have to maximize your ROI related to CRM and competitive intelligence."

**"It's not about selling you something new; it's about finding ways to **maximize your ROI** related to CRM and **competitive intelligence.**"**

Paul VanderMeer, Chief Knowledge Officer, Bilzin Sumberg

## HARBOR

Harbor is a trusted provider of professional services to the world's leading law firms, corporations, and their law departments. With our globally integrated team of industry experts - strategists, technologists, and specialists – we navigate alongside our clients, providing essential resources and invaluable insights to help steer them towards a future where they can thrive.

### Bilzin Sumberg

Bilzin Sumberg counsels clients whose business and legal opportunities and challenges span the United States, Canada, Europe, Latin America, the Middle East, and Asia. The firm's growth has paralleled that of its Miami home base, a region known for its rich cultural, social, and professional diversity. Bilzin Sumberg stands at the center of virtually every major transaction shaping Florida and is at the forefront of the state's most pressing economic issues — from infrastructure, transit and mobility to affordability and the diversification of the state's economy.