

CASE STUDY

LITIGATION MANAGEMENT INC.

www.lmiweb.com



THE ORGANIZATION

Founded in 1984, Litigation Management Inc. (LMI) is an industry leader in providing a wide array of superior discovery, litigation and case management services to support successful, efficient and cost-effective matter resolution. The company's skilled staff includes medical and legal specialists, backed by cutting-edge technology, to provide clients with the resources necessary to support litigation and business strategies.

THE CHALLENGE

Like many organizations, LMI began with a basic on-premise CRM system. However, as the company grew, it struggled with utilization among its staff as there were no formal or consistent processes for using the system. It served as little more than a contact rolodex, with data input unfit for analytical purposes. Users were unable to view prospects effectively within the framework of the process, from proposal through to sale and litigation.

Additionally, the CRM system did not integrate with other key business systems to tie data together in one place. This disparate functionality of systems translated to inefficient business processes and a lack of cohesion between the organization's sales and operational staff.

Upon formalizing a new sales process for its growing team, LMI's leadership knew the existing CRM system would fall even further behind in meeting the company's evolving needs. Thus, they made the decision to upgrade – moving to the cloud and configuring the system based upon the new sales process.

“Once we had the formalized sales process in place, we wanted our CRM to match it,” says Sonya Virant, LMI's President and Chief Operating Officer. “We engaged TrellisPoint to implement our sales process within Microsoft Dynamics 365, getting rid of things we didn't need in the CRM system and adding additional items we did – all while putting our brand's stamp on it.”

LMI chose TrellisPoint to tackle the CRM upgrade and migration project because of the company's trusted reputation and high quality of upfront strategy.



LMI's migration to Microsoft Dynamics 365 has brought sales and operations functions together within a single system so staff can operate more efficiently and cohesively.



THE SOLUTION

TrellisPoint kicked off the project with a number of review sessions to discuss and document LMI's current CRM pains, as well as its wants and needs for the new system. With these findings in mind, the team then formulated a plan on how to approach the migration to Microsoft Dynamics 365. Highlights of the resulting solution include:

PERSONALIZATION

Throughout the process, it was critical to configure the CRM system to speak LMI's language - rather than adjusting LMI's business processes and language to Microsoft's out-of-box specifications. From updating system terminology - such as renaming "leads" to "prospects," the company's preferred term - to creating prospecting and litigation workflows, TrellisPoint tailored the solution to match LMI's unique daily operations.

CENTRALIZATION

By facilitating integration with SharePoint, LMI users can now store, organize, and access case-specific information in a single, central repository - in the office as well as remotely. With variable permission-based access, TrellisPoint ensured the solution adheres to industry standards and policies for storing information securely.

AUTOMATION

TrellisPoint established automated workflows and notifications within the system to streamline processes and eliminate the possibility of information falling through the cracks.

For example, when a new prospect is entered into the CRM system, a notification is pushed out to LMI's research team to prequalify that potential organization. Throughout subsequent stages of the sales process, additional notifications go out to the sales representative and management to keep the lead moving through the pipeline.

THE RESULT

LMI's migration to Microsoft Dynamics 365 has resulted in a centralized database with a wealth of information, organized relationally by case. Bringing sales and operations functions together within a single system of truth, LMI's staff can operate more efficiently and make better-informed decisions.

"This cohesiveness will ultimately increase the top line, and with our proven operations it will also increase our bottom line, our profitability," Virant says. "This really supports and enables our sales people to be the most effective they can be here at LMI."

She credits TrellisPoint for a smooth experience, from project conception to completion.

Upon engagement, TrellisPoint guided LMI through a discovery process, building upon their understanding of our operations and unique system needs. From the discovery phase through system implementation, they operated with complete professionalism; the project was well-managed, with all deliverables completed successfully, on time and within budget. They remained actively engaged with LMI throughout the process so there were no surprises.

