

CASE STUDY

Database Profiling & Updating for an International Legal Research Publishing Company

Program Objectives

The client had an existing combined database of 700,000 "small" Law Firms (those with less than 15 Attorneys). Almost 300,000 of these Firms had no Attorney Contacts identified and there were over 600,000 Attorney Contacts identified in the remaining 400,000 Firms, with little information captured on those Contacts. Prior to recently converting to SAP, the database was housed in a mainframe, with little ability to capture and store individual Contact information. There was no ongoing data hygiene process, other than postal service returns and occasional electronic data append processes on the Firm level. The client knew the data was inaccurate and incomplete, however, they had no idea what data was accurate and what data was inaccurate. The client's Direct Marketing staff was using this data regularly in multiple mailings over the year, amounting to an average of more than \$10 per Firm and/or Contact. To improve their current situation, the client collaborated with Volkart May & Associates, Inc. (VMA) on the following objectives:

- Begin with a Phase 1 program to determine the levels of accuracy and completeness at the Firm and Contact levels.
- Measure Customer vs. Prospect data separately by size of Firm, marking each data field as verified, updated, deleted or added.
- Attempt to contact up to 7,500 total Firms and Attorney Contacts by phone over a period of 60 days to capture information.
- Obtain key Attorney Contact information such as email address and permission, Practice Areas, Bar Dates, Education and Professional Memberships/Associations.
- Provide ongoing data review reports and a final analysis to present to executive management to receive adequate funding to continue the process through the entire database.

The Solution

The client initially provided the entire "small" Firm database to VMA in order to determine the number of available records by customer and prospect size segments (with phone numbers). Once the segment records were identified, VMA was able to allocate the Phase 1 records using similar percentages of the total database. VMA started with a 2-step approach to initially contact the Firm to verify or update that information and to obtain Attorney Contact information/names where possible. The second step was to initiate contact with the Attorney to capture their information. Halfway through Phase 1, it was determined that we would need to modify the process from a 2-step process to a multiple call process to the same representative in the Firm to obtain and provide the Attorney Contact information.

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Results

VMA was successful in reaching (or identifying for deletion) 87.4% of the Phase 1 records. Of the total Firms, over 32.6% of the records were identified as "Known Bad" and could be removed from this database. Other findings from the Firm level:

- 18.5% of the Firms listed were either Out of Business, the Phone Number was Disconnected, Wrong or a Fax, or it was a Duplicate Record
- 11.5% of the Firms listed were Not a Law Firm or would not be appropriate to purchase
- 2.6% of the Firms listed had more than 16 Attorneys, which could be removed from "small" Firm marketing and transferred to the "medium" Firm group

Additional knowledge was gained as a result of this Phase 1:

- Average number of Contacts per Firm per segment
- Of the Law Firms that were in business and "Known Good" that VMA updated/verified information for:
 - 28% of the Firm Names were inaccurate or incomplete
 - 17% of the Firm Addresses were inaccurate or incomplete
 - 22% of the Firm Phone Numbers were inaccurate or incomplete
- Of the Attorney Contacts that were part of the "Known Good" Law Firms that VMA updated/verified information for:
 - 57% of the Contact Names were inaccurate or incomplete
 - 99% of the Contact Email Addresses were incomplete
 - 100% of the Contact Practice Areas were incomplete
 - 78% of the Contact Bar Information was inaccurate or incomplete

From the results obtained in Phase 1, we project annual marketing savings of \$2.0 million to \$5.7 million from the removal of the "Known Bad" records, as one of several ways to cost justify the program.