



Rethinking CRM for Law Firms

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Why Law Firms Need to Adjust Their CRM Strategy to Increase ROI

Global law firms find themselves at a crossroads. The traditional silos of business development (BD), client onboarding, risk management, and matter management are no longer sustainable in a world that demands efficiency to drive strategic growth. Change is already happening, thanks to new AI-powered technologies. While firms scramble to implement the latest AI tools, it's easy for leaders to overlook something far more fundamental: the bigger picture of their client relationship management (CRM) and how technology can create synergies across the entire client lifecycle.

The Benefits of Modernizing CRM

- **Build stronger client relationships** with relationship maps and a unified client history.
- **Win more deals over competitors** by surfacing lessons learned and maintaining continuity across pursuits.
- **Capture money left on the table** by identifying natural cross-sell and add-on opportunities.
- **Grow your practice** by tracking which BD activities generate profitable new business.
- **Work smarter and serve better**, through streamlined workflows so lawyers can focus on high value client work.

How Can A&M Help?

Technology matters, but so does the business model around it. Our structured approach encompasses the following core principles:

1. **Assess current maturity:** baseline marketing, BD and intake processes then build a



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prioritized roadmap.

2. **Streamline workflows with advanced integrations:** connect CRM to risk/compliance, practice management and document systems so CRM powers the entire client lifecycle.
3. **Implement user-friendly interfaces:** reduce friction and increase adoption with simple, intuitive user experience (UX).
4. **Design for scalability and security:** align business and tech teams to deliver secure, scalable solutions.
5. **Develop key metrics:** track lead conversion, opportunity origination, time to onboard and other KPIs to guide investment.

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