Demographic Analysis using Lexis Front Office

Lexis® Front Office
powered by Time Matters® 9.0

LexisNexis®

White Paper

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Executive Summary

Law firms track large amount of information about people in Lexis Front Office powered by Time Matters. This is usually limited to names, addresses, phone numbers, and other personal information. Using the custom fields feature of Front Office, additional demographic information can be tracked. This information can be filtered effectively using ad hoc searches or QuickTabs thus giving the firm a window into trends regarding the makeup of the client base and any changes of this makeup over time allowing for more targeted and powerful marketing efforts.

Acknowledgments

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Author's note:
Demographic analysis (i.e. the use of people's gender, racial, ethnic, socio-economic, cultural, or linguistic background to group them for various marketing efforts) can sometimes smack of "racial profiling" or other discriminatory actions. The author condemns any discriminatory actions based on such criteria while stressing the importance of good demographic analysis as a tool for understanding and directing marketing activities. Demographic information collected about clients and potential clients should only be used for legitimate marketing activities and never as a source for discrimination.

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Demographic Analysis using Front Office

dem·o·graph·ics (dĕm′ə-grăf′ĭks)
n. (used with a pl. verb)
The characteristics of human populations and population segments, especially when used to identify consumer markets
Source: www.websters.com

Introduction

Law firms are businesses – and for any business to survive, it must have clients. The activities undertaken by the firm to develop new clients are known as marketing. These include – but are not limited to: special services, advertising, promotions and strategic alliances. Marketing activities, however cannot take place in a vacuum. The precise targeting of marketing activities to yield maximum effect comes from a deep understanding of who the target clients are and what motivates them. In order to understand clients, you must understand their socio-economic, racial and cultural backgrounds. For example, firms that service low-income clients and those that service high-income clients are very different – they must offer different services and must perform different marketing activities to obtain new clients.

The tracking of various data relating to a client's background characteristics is known as demographics. Demographic analysis can be used in law firms, as it can in all businesses, to help gain knowledge as to the makeup of the client base which can then drive the firm's marketing efforts. Demographic analysis should be an on-going process since firms often experience shifting of the demographic makeup of their clients over time as the population changes or as the firm moves into new types of law or into new endeavors.

Front Office to the Rescue

Practice management software, like Front Office, has classically been used to track basic information about contacts like full name, address, and telephone numbers. Front Office, however, offers much more due to its flexibility in customization. User-definable fields on the contact screen can be set to track demographic information.

How to get demographic information

Demographic information can be a very sensitive subject. Great care and thought must be given as to the types of questions the firm wishes to have clients answer. Some find it useful to have a standard new client questionnaire that can be filled out by the potential new client.

What kind of information could be tracked?

- Age (Date of Birth)
- Gender
- Primary Language Spoken
- Ethnicity / Race
- Annual Income
- Number of persons in the nuclear family
- Geographic distance from law firm
- Religious affiliation

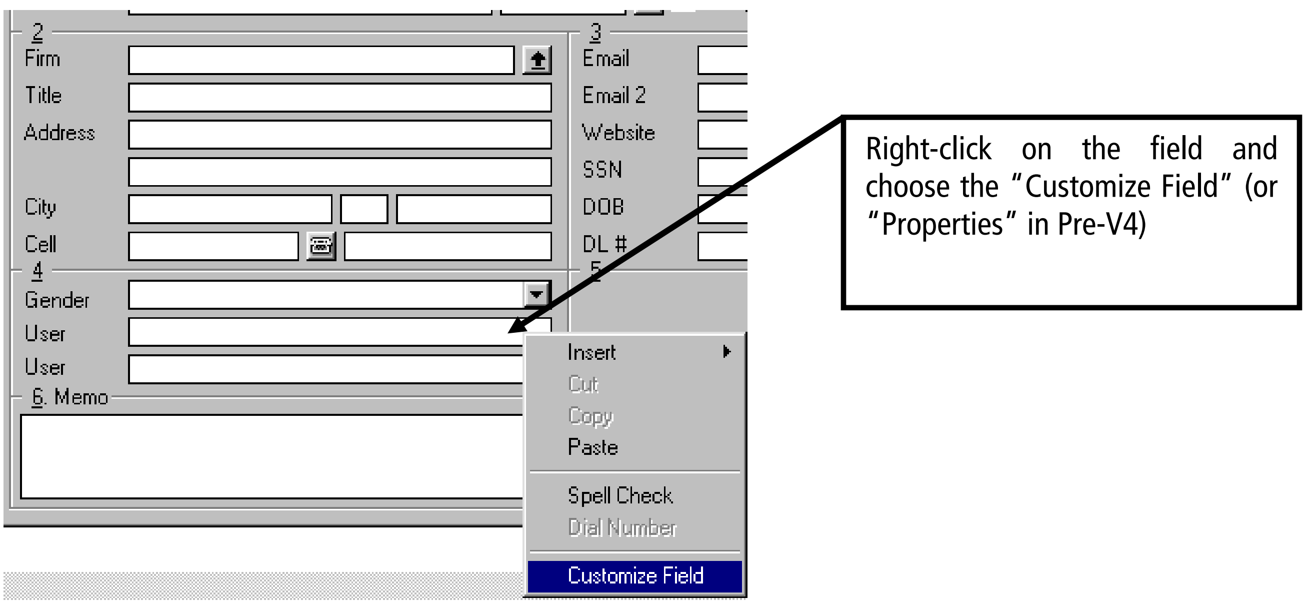
Some examples of successful uses of such information

Primary language: Using demographic analysis, a firm sees a marked increase in clients whose primary language is Spanish. The firm can then analyze what factors are driving this change. Have the neighborhoods around the law firm had a recent influx of Hispanics? Has the firm had some inadvertent success in advertising to the Hispanic community? Has a recent Hispanic client been a good source of referrals? The source of the increase can be researched and determined. After the determination, concerted marketing efforts can be undertaken to enhance advertising to Hispanics and to add additional services, such as Spanish-speaking employees. Perhaps it is time for the attorney to take a few Spanish courses?

Gender: A female divorce attorney represents a high-profile professional football player in his recent divorce. By analyzing the demographics of divorce clients following that case, the attorney notices a significant spike in male clients coming to her for divorces. Bolstered by this confirmation, she directs future advertising in publications primarily read by men.

How to track demographics using Front Office

In order to track demographic information, custom fields must be set up on the contact form. For all Versions since Version 1.98, fields can be changed by right clicking on the field and choosing either the PROPERTIES or CUSTOMIZE FIELD menu items.



Fields can be changed to various types such as date fields (for date of birth), money fields (for annual income) and drop-down lists (for gender, primary language and most others).

Creating QuickTabs and Searches

Once the demographic data has been collected, it can be filtered to turn it into meaningful information. Follow the directions in the Front Office help (Keyword: Quick Tab) to set up QuickTabs that filter the fields with demographic information. Most all of the filters will require the Advanced filtering techniques so familiarize yourself with the Advanced filters (Help keyword = "Advanced Search").

Record Counts

Once the contact records are filtered and sorted, it is useful to get an accurate count. Often, when there are only a few records visible, it is easy for the human eye to determine the number. This becomes more difficult when there are potentially hundreds of records in the filter. An accurate records count is available under **VIEW ▸ RECORD COUNT**.