



Taking Business Development
to a Higher Level

Lexis® InterAction®

Kilpatrick Townsend & Stockton LLP

Industry: Law | Product: Lexis® InterAction®

Randy Pulley knows what it's like to track business
development the old-style way.

Like many firms, Kilpatrick Townsend once kept tabs on their
pursuits and opportunities through a single spreadsheet
document on a shared drive. For a BD veteran like Mr. Pulley,
it wasn't hard to pick apart the flaws in the process.

*"If you think about the flutter of activity that happens in
marketing and business development reporting, you have
people that are entering new opportunities, you have people*

*"I report to the firm's Management
Committee and InterAction Business Edge
really has been the foundation for business
development reporting"*

Randy Pulley, Director of Business Development,
Kilpatrick Townsend & Stockton LLP

*that are making updates, and you have people that are just
making changes constantly. When you only have one file, only
one person can make a change at any one time."*

*"We needed a tool that allowed multiple people to make edits
at any one time and that was easy to access, that was on, say,
the cloud."*



Enterprise Solutions

"We wanted something that allowed us to see more trends, more data, more analysis"

After more than 15 years' experience with the InterAction® CRM solution, Mr. Pulley's firm accepted his recommendation to build on their established customer relationship management platform and extend their BD capabilities to the cloud with InterAction Business Edge.

"Business Edge was a no-brainer to me," he said. "Some people don't necessarily think about the lifecycle of opportunities. They tend to think of the BD process as a series of projects. They get the pitchbook or proposal out the door and move on to the next project. You're only halfway there at that point. You need to stay in front of the client until they make a decision. Win or lose, there is always a next step. Either way, you should build on the relationships and the research you put in."

"We knew that there were a lot of great things that Business Edge would do for us, and we wanted to just jump right in. As we implemented Business Edge, we went back and input just the last three months of data. That way we could get started faster and start seeing some of the ways the program operates."

"It takes a lot to get fee earners to buy in to what you're doing, so we wanted to make sure that we didn't make mistakes. We also knew going forward that we would be inputting new data, so in just three more months, we would have six months worth of data."

"Business Edge helps team members follow pursuits all the way through a client decision"

For a BD pro like Mr. Pulley, even losses are opportunities.

"If we don't win a particular opportunity, we push to understand what we're doing to continue those relationships. Business Edge helps our team members gain a better understanding of the need for follow-up. They're more mindful that the pitchbook or proposal is only the halfway point. We want our BD team members to stay involved in pursuits and maintain a good understanding of client development and opportunities. Always assume you're losing. Assume everyone

is voting against you until you truly confirm we have the client's support."

"We reach out to fee earners all the time after the proposal has been sent out and we'll ask, 'Hey have you reached out to this client? Have they made a decision? What can we do to keep this moving forward? Somebody has to win it, why not let it be us.'"

"Business Edge has really helped us be mindful of potential conflicts as well"

One of Mr. Pulley's greatest challenges before Business Edge was being able to stay on top of what every fee earner had going on at any one time.

"Oftentimes in a firm our size, you have fee earners that are pursuing opportunities on their own and they don't always necessarily communicate what's going on. If not careful, fee earners could spend time and energy on prospects and they get really excited that they have this opportunity and it's really painful to say, 'There's a conflict. You really can't go after that.'"

Client Snapshot

Kilpatrick Townsend & Stockton LLP

CUSTOMER PROFILE: Kilpatrick Townsend is an Am Law 100 firm based in Atlanta, GA, with 16 US offices and 3 international offices. With more than 650 lawyers, the firm's service areas include bankruptcy, business & finance, construction & infrastructure, government & regulatory, intellectual property, labor & employment, litigation, and tax.

BUSINESS SITUATION: With business development activity happening simultaneously across the firm, Kilpatrick Townsend's Director of Business Development knew there was a better way to track and manage it all. The firm traded their single spreadsheet for InterAction Business Edge – a solution that allowed multiple people to make updates at the same time, from anywhere. It also allowed firm leaders to gain full visibility into business development activities.

SOLUTION: InterAction Business Edge

BENEFITS:

- Access business development information in real-time, from anywhere
- Make strategic decisions backed by data
- Leverage dashboards and reporting for improved tracking and analysis
- Win more business from new and existing clients

"Now we leverage Business Edge to start reviewing pursuits earlier so we can raise opportunities up to the Management Committee, who can help keep fee earners from spinning their wheels."

"The Management Committee has a great view of what's going on across the firm and they might say, 'There's a potential conflict with this client. Let's be mindful of that going forward.'"

"We share data with key stakeholders like Management Committee members, Office Managing Partners, and Practice Team Leaders"

As the Director of Business Development, Mr. Pulley answers to the leadership team about the firm's progress.

"With Business Edge, I'm able to show them what's going on in certain offices and practice teams. I can explain to our leadership where the wins are, where the losses are, and where there are obstacles."

"They're looking for information that is relevant to them, key information like due dates, tasks, a good description of what the opportunity is, next steps and that sort of thing. Thanks to Business Edge, the right hand and the left hand know what each other are doing and the Management Committee knows what's going on as well."

To learn more, visit:

www.lexisnexis-es.co.uk/our-solutions/interaction

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