

We worked with an AmLaw 200 firm to rapidly design and implement Intapp's OnePlace for Marketing



The project

We worked with our client to design and implement Intapp's OnePlace for Marketing CRM solution. This application supports firms' marketing and business development initiatives, helping to better understand and develop client relationships and drive profitable revenue.

The project's scope

The focus of this project was on implementing capabilities to support our client's business development initiatives, in particular:

- △ Cross-practice industry and key client teams
- △ Opportunity management and related activities
- △ Better visibility into client relationships and performance

We worked closely with the firm's chief strategy officer to map out the process and information needs. From there we conducted several in-person design sessions and in-person and remote prototype reviews so we could design the system to align with the firm's goals.

The design, configuration and testing was completed rapidly in under 80 hours in just over 2 months.

Eventually, the system will integrate financial data from the firm's Elite time and Billing system. In the interim, we migrated key client and matter data so that the system could be immediately put into use.

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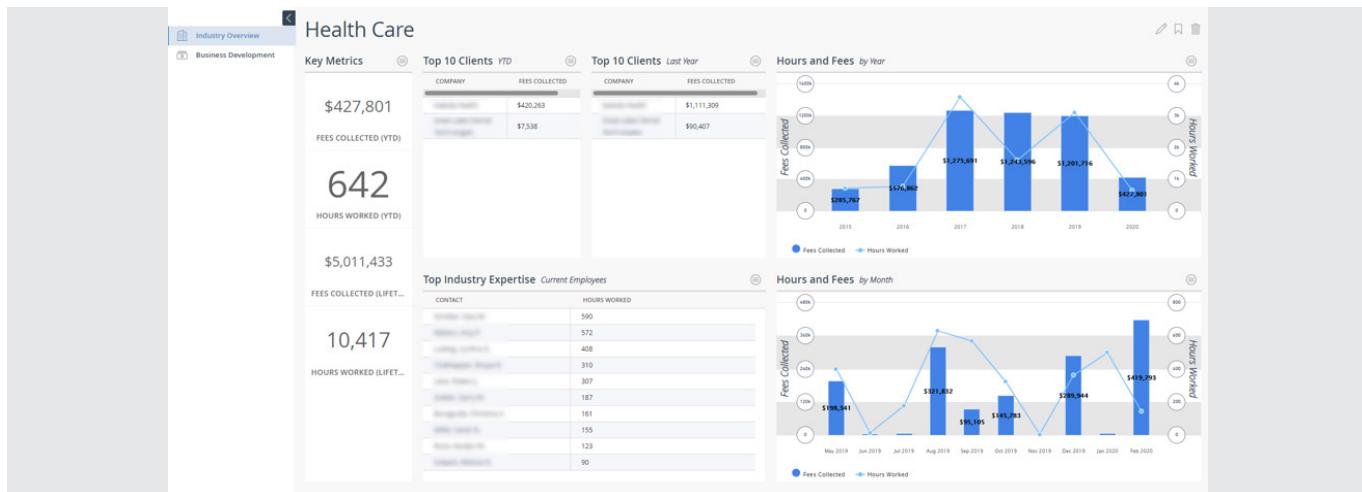
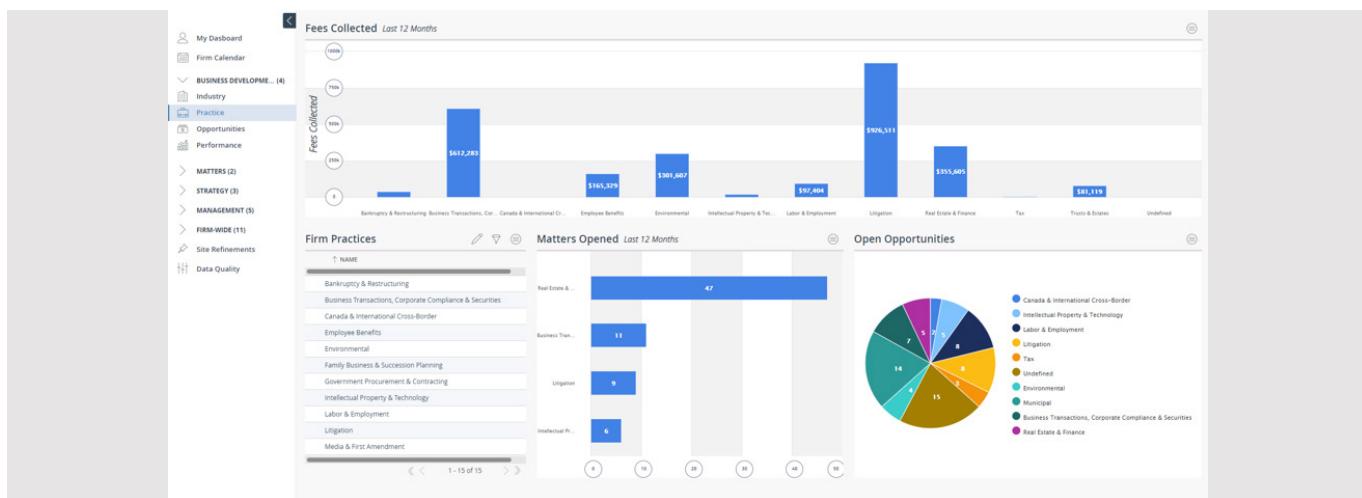
Contact Bryan Austin, Business Development Practice Lead

bryan.austin@pinnacle-oa.com | www.pinnacle-oa.com

Outcomes

The OnePlace CRM system addresses three key problem areas for our client:

- Previously, they used Excel spreadsheets to track RFP and pitch/proposal activities. However, these quickly became out of date and were often neglected by the firm's lawyers.
- They tasked their chief strategy officer with changing the firm's outward behaviour to focus on industry alignment. However, they did not have a means to understand the complete picture of their industry experience and activities.
- Practice leaders and partners, along with marketing and BD staff, needed to be able to understand performance and activities related to the firm's key clients.



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Summary

Not all CRM projects have to be large, drawn out endeavours. The most successful follow a phased approach with individual phases comprising highly targeted goals and capabilities. This specific project was itself a follow-on phase and was able to leverage and build upon the work of the prior phases.