



How we helped a leading US law firm achieve quick success with OnePlace for Marketing

Our client

A leading US specialist IP law firm.

The project

Our client was using Thomson Reuter's Business Development Premier CRM suite. However, with the BDP application due to be sunsetted, they needed to find a suitable alternative for relationship intelligence and core CRM functionality. The client selected Intapp's OnePlace for Marketing CRM and Relationships products and engaged Pinnacle to handle the implementation.

The project's scope

We implemented OnePlace CRM with a focus on company and contact management, including financial information integrated with the firm's 3E practice management system, to provide a 360-degree view of their client relationships. We also configured opportunity management so the firm could effectively track RFPs and other pursuits with both clients and prospective clients.

We also:

- Configured the toolset to support broader marketing and business development activities, including email marketing, event management, and key client management.
- Carried out the initial data migration and cleansing of existing marketing lists and BDP opportunity data.
- Provided admin, power user, and end user training to ensure all users would be able to efficiently and effectively accomplish their goals.



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Contact Bryan Austin, Director, Business Development Practice

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

Outcomes

From project kick-off to hand-over, the entire implementation was completed on-schedule in 6 months, and delivered on budget and to spec.

The flexibility of the tool allowed us to quickly deploy additional functionality that, while out of scope, would increase the value of the system. One such example was configuring support for tracking 'client visits' (senior annual client reviews), which eliminated the previously used Excel worksheet and stored the related tasks, activities, and outcomes alongside other client CRM data.

Our client was able to start actively using the new CRM system very quickly. Within days they were managing opportunities and client visits and working with contact data for email marketing.

Summary

Although successful implementation of the technology is critical, it's only the first step towards achieving objective and measurable business value.

Since the launch of the system, our client has seen immediate adoption by their teams. This has improved their marketing and BD operations – all of which will ultimately lead to tangible business benefit.

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