

# Foundation Pitches & Proposals Service



## Description

Implement the Foundation Proposal Generation module and configure the solution to allow the firm to create pitches and proposals.



## Pain Points

- Laborious tasks in manually preparing pitch documents, without automation:
  - Lost time and productivity in compiling and formatting pitch content and components, delaying responses to Clients and possible loss of business opportunities.
  - Non-compliant branding and inconsistent messaging affecting the firm's professional image.
  - Risk of using outdated and/or unapproved content when using shortcuts, such as copying from prior pitches.
- Limited selection of off-the-self materials for a range of practices and industries, compounded by the challenge of maintaining up-to-date content across the sets.
- Compliance risks due to lack of standards that align with industry standards and regulations.
- Lack of insight into opportunity pipeline, outcomes and ROI:
  - Pricing, AFA and discount history .
  - Who pitched to a client last.
  - Which pitches were successful.
  - How many active pitches are we working on, etc.
- Poor use of lawyer time due to disconnected review process & version control.



## Outcomes/Benefits

- Implement and configure Pitch & Proposal add-on module to increase efficiency, allowing teams to redirect focus onto high-value and strategic tasks while mitigating risks.
  - Pinpoint experience needed to tailor responses and win business, in minutes.
  - Quickly access a full library of your past responses and boilerplate content.
  - Tailor pitches with awareness of prior pitches to the client, fee proposals, etc.
  - Easily create diverse and tactical pitch teams.
  - Boost efficiency by giving your team an up-to-date library of industry and practice pitches (top experience, key lawyers, etc.) that's easily customizable.
  - Enable dynamic content management for RFPs where customers dictate the format.
  - Simple workflow for managing final versions and collaboration
- Know which lawyers and practice teams are attached to what pitches and proposals.



## Firm Resources Required

- Input and collaboration from teams involved with submissions
- Foundation Proposal module license