



LITERA

Foundation

CASE STUDY

Building a Scalable Matter Profiling Program —an AmLaw 50 firm's Journey to Data-Driven Program Monitoring with Litera Foundation

The Challenge

An AmLaw 50 firm's Matter Profiling Program was expanding rapidly, but that growth brought new complexity. With multiple data collection points and an extensive team of subject matter experts that contribute to the Foundation system, the firm found it challenging to track profiling activity, monitor governance, and measure progress across 16 offices and numerous practice areas.

"Establishing oversight of the program across our global footprint was our biggest hurdle," explains the firm's Senior Manager of Knowledge Solutions. "We needed analytics to show us who should be involved and when, what strategies were working well and where we had gaps that needed our attention."

Additionally, the firm needed a way to empower users to leverage high-quality experience data, demonstrate value to leadership, and build engagement among teams that hadn't yet reached goals for adoption levels.

The Solution

The AmLaw 50 firm implemented [Litera's Foundation](#) to create a responsive, stakeholder-centered profiling program capable of providing enterprise-wide visibility while accommodating the unique requirements of individual practice areas. They focused on developing an innovative analytics framework that leveraged Foundation's flexible architecture.

The solution featured:

- **Custom dashboards** for real-time tracking of profile progress and performance
- **Executive summaries** that clearly communicated insights to leadership
- **Data visualizations** that made reporting intuitive and storytelling impactful
- **Action plan tracking** to drive accountability and continuous improvement

Foundation's adaptability allowed the firm to tailor its strategy for different practices while maintaining data consistency throughout the firm.

"It was really about our profiling workflow, to better understand and measure our success," said the Matter Profiling Program Lead. The initiative focused on creating metrics for program health, tracking profile completion and quality, and organizing data to identify both high-performing areas and those needing additional support.

A dedicated core team, deeply familiar with Foundation, led the rollout with an iterative approach, refining dashboards and processes as the program evolved.

The Results

The firm's Analytics Reporting initiative helped strengthen the firm's experience and knowledge management strategy, establishing data as the foundation of their decision-making process while delivering tangible improvements in operational efficiency.



LITERA

Foundation

CASE STUDY

A few results they've seen since implementing Foundation include:

- **Strategic Impact:** Teams utilize comprehensive data to inform business development strategies
- **Improved Oversight:** Proactive identification of profiling gaps ensures data quality and maintains data integrity across the platform
- **Cultural Shift:** Profiling mindset change from administrative work to strategic contributions that add real value for pitch preparation, RFP responses, precedent research and general knowledge management
- **Scalability:** The flexible framework accommodates continued expansion with sophisticated dashboards, enhanced self-service capabilities, and a focus on AI-readiness
- **Executive Reporting:** Provides streamlined, actionable intelligence in formats optimized for leadership decision-making

This reporting framework allows Profile Managers to identify performance trends and enhancement opportunities while providing leadership with quantifiable metrics that demonstrate clear return on investment.

"We figured out what data we wanted to showcase and how to measure success. Foundation helped us do that."

Matter Profiling Program Lead

Foundation has become essential to both Practice Development and Business Development teams, establishing a continuous improvement cycle that enhances profiling compliance and program effectiveness across the organization.

Looking Ahead

The firm's matter profiling program has evolved from data management into a strategic engine that aligns with the firm's knowledge sharing, business growth, and operational excellence goals. Through Foundation, the AmLaw 50 firm has transformed institutional knowledge into a competitive advantage that powers smarter growth, superior client delivery, and continuous innovation.

Want to see what Foundation could do for your firm? [Schedule a demo](#) today



Litera has been a global leader in legal technology for 25+ years, helping legal teams work more efficiently, accurately, and competitively. As a leader in document workflow, collaboration, and data management solutions, we empower legal teams with simplified technology for creating and managing all their documents, deals, cases, and data.

For more information about Litera visit litera.com.