

How Baretz+Brunelle Uses Foundation Proactive to Stay Ahead of Client Needs

BARETZ+BRUNELLE

Baretz+Brunelle (B+B) is a growth advisory firm that has spent over 20 years helping the world's leading legal businesses build market-leading reputations, merge and acquire, manage crises, hire and accelerate top talent, make transformational business decisions, improve financials and operations, raise capital, deploy technology, launch new services, secure new clients, and dominate geographies and industry niches. Their clients include Am Law 100 and 200 firms, elite boutiques, legal technology companies, and others across the legal sector. These are organizations where relationships are built on relevance and timing. For Jason Milch, partner at B+B, providing value to prospects and clients means knowing what matters to them before they have to say it.

Foundation Proactive, powered by Postilize, brings proactive relationship management to law firms by surfacing the right signals and outreach opportunities at the right time. This approach to surfacing targeted intelligence at the right moment has been key to supporting his ability to stay ahead of their needs.

What Challenge Did B+B Face in Business Development?

B+B's clients are among the most sophisticated organizations in the legal industry. They can tell immediately whether the person reaching out has done their homework.

Jason needed a way to more efficiently monitor the issues affecting his prospects and clients so he could show up with insight specific to their situation—not just timely outreach, but meaningful outreach. While B+B has deep resources that enable it to keep up with what's happening in its clients' worlds—ranging from litigation and M&A to real estate, IP, and every practice in between—it sought a higher level of certainty that its outreach would resonate.

That search for deeper client intelligence was what led him to Foundation Proactive.

How Does B+B Use Foundation Proactive?

Jason came to Foundation Proactive with one use case in mind and discovered a second one organically. "I have been able to hone two separate use cases," he says. "Identifying business development touchpoints and identifying issues that my current clients might be able to leverage for their own BD or media opportunities."

Identifying the right moment to reach out

On the prospecting side, Jason uses Foundation Proactive's practice and industry filters to focus on what matters most to each prospect. "The practice and industry filtering are keys for me," he says. "Homing in on the industries I know they serve has been valuable."

The relevant information surfaces without manual searching. He arrives at every outreach with something specific to say—a substantive reason to be in front of someone.

Staying ahead of clients' needs

For existing clients, Jason relies on Foundation Proactive's Signals to stay ahead of key practice or industry developments. The alerts surface relevant developments—sometimes before they happen, giving him the opportunity to reach out to offer strategic support.

Jason also uses the platform to identify opportunities where clients could benefit from media exposure or thought leadership positioning. This dual-purpose approach enables him to add additional value to the firm's established relationships.

What Results Has B+B Seen with Foundation Proactive?

Foundation Proactive has strengthened how Jason's outreach is received. The platform ensures that opportunities don't fall through the cracks, and that his outreach timing is appropriate. Those factors change how conversations begin.

"The signal timing has been a plus," he notes. "Not missing an issue or being late on a touchpoint is critical, particularly on the client service side."

Being there with the right message at the right time is what makes the outreach worth sending.

"I won't send information that isn't relevant to them, and they will know I understand their business. Building that sort of trust is critical to BD."

Jason Milch
Partner, Baretz+Brunelle

See how Foundation Proactive helps your business development team stay ahead of client needs. [Request a demo.](#)



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