

How a Top 100 Law Firm Turned Business Development into a Competitive Advantage

PRODUCT

Litera Foundation 365

ORGANIZATION SIZE

500+ Lawyers Globally

LOCATION

London, UK

Producing more pitches
without more bandwidth

Refining drafts instead of
writing them from scratch

Becoming strategic advisors,
not drafters

For a top-ranked UK full-service firm, client relationship data is spread across hundreds of attorneys and thousands of matters. Without a centralized way to surface that history quickly, valuable institutional knowledge stayed locked in silos and out of reach at the exact moment it mattered.

Complex RFPs suffered, and the total volume of pitches the firm could pursue was effectively capped. The BD team relied on attorneys to provide context ahead of pitches, and newer team members defaulted to blank templates while they built institutional knowledge the old-fashioned way.

"Interaction had become no more really than an address book. We wanted a product that would support understanding key relationships, pipelines, and business development."

Director of Marketing Operations & Systems,
A Top-Ranked UK Full-Service Firm

The firm implemented Litera Foundation initially as a proposal generator. As the team grew familiar with the system, they discovered its broader value: a single window into the full client relationship lifecycle including matter history, billing context, and prior work, surfaced at the exact moment it can deepen a relationship or create a new one. That shift from drafting tool to strategic platform came through familiarity — just time and exposure.

The BD team now does more up-front research about the overall relationship and has a better understanding of client billing history. Team members explore Foundation and run matter searches before meeting with attorneys, entering conversations as advisors rather than note-takers.

Younger and newer team members feel more empowered to create stronger first drafts informed by good experience narratives and solid stock content. Access to the same firm intelligence that senior team members rely on lets newer hires produce substantive work early on.

For simple pitches where the team selects the content to include, Foundation produces a near-final version with minimal attorney involvement. For complex RFPs with detailed strategy questions, attorneys still craft the substance, but BD provides better drafts to work from.

"We are using Foundation for surfacing relevant experience and understanding the full client relationship, in addition to using it as our proposal generator."

Director of Marketing Operations & Systems,
A Top-Ranked UK Full-Service Firm

By removing the bottleneck at the drafting stage, the BD team can produce near-final versions of straightforward pitches without attorney intervention, allowing the firm to pursue more opportunities in the same amount of time. The constraint was never capacity, but rather the access to the right information at the right moment.

Newer team members produce informed, substantive drafts from day one. For simple pitches, Foundation delivers near-final output. For complex RFPs, attorneys work from a strong starting point. The overall quality of the firm's proposals has risen.

The team now runs matter searches independently before meetings, arriving with a working understanding of the client relationship, billing history, and relevant experience. That preparation shifted their role and attorneys are going to market with more relevant, better-informed content.

"Having more insight into our firm's client relationships through Foundation better equips our BD team to support our attorneys' marketing efforts."

Director of Marketing Operations & Systems,
A Top-Ranked UK Full-Service Firm

For this firm, the return on Foundation isn't measured in time saved alone - it's measured in the growth that followed. That's RoAI in action.