QorusDocs

Am Law 100 Firm Modernizes Global Pitch and Proposal Operations

A large global Am Law 100 law firm implemented AI-powered QorusDocs proposal management software to automate, simplify, and accelerate its pitch and proposal process. Integrated with the firm CRM system, the cloud-based solution helped the pitch team ramp up efficiency and productivity, leverage a central content hub to improve collaboration and ensure accurate and engaging proposals, and track business value across global operations and multiple areas of law using detailed insights and data-driven reporting.

The Challenge: Manual Processes Impede Efficiency

With thousands of clients, a substantial dedicated pitch team, and large business development team across global operations, this top-tier law firm manages high volumes of proposals and client pitches of varying complexity and within various areas of law. The firm was experiencing huge demand for its proposal services and was seeking ways to scale the proposal process and ensure best practices were employed consistently throughout the pitch cycle, whether developing high-value, complex proposals or creating simpler "self-serve" pitches.

The law firm was grappling with ongoing proposal management challenges that continued to hinder operational efficiency and pitch team productivity. Running thousands of pitches annually, the documents were being created manually in Microsoft Word and Microsoft PowerPoint and stored in Microsoft SharePoint—a time-consuming and cumbersome process.

The sheer size and scope of the organization meant that organizing, updating, and managing vast quantities of evolving content had become an obstacle to accurate and timely proposal documents. A senior executive on the pursuits team noted, "It's a difficult challenge to store and manage content manually and make sure it's approved and current. Frankly, it's impossible to wrangle and successfully capture all of the content across the firm because there are little pockets of information everywhere."

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As part of its digital transformation and globalization of all non-lawyer services, the law firm recognized the need to implement an automated proposal management software to:

- Solve for partner biographies without giving responsibility to the pitch team.
- Create a central repository of content and templates including PowerPoint.
- Integrate seamlessly with the firm's soon-to-be deployed CRM.
- Offer insights into the proposal process via detailed reporting and granular data.

> ***"QorusDocs has been critical to the success of our team members working on pitches. We've been able to increase productivity and connect our activity to outcomes. And with better data, we can understand and improve our assignment process, content needs, and the variation of requirements across our global offices."***
>
> Senior Executive
> Top Tier Law Firm pitch team

The Solution: Automation Drives Productivity

As part of its enterprise-wide digital transformation efforts, the law firm implemented AI-powered QorusDocs proposal management software—integrated with the firm CRM system—in 2020 to automate and streamline pitch and proposal creation through a single source of data-enriched content and established best practices.

By eliminating the need to search for information across a collection of disparate, disconnected data repositories, the law firm increased pitch team efficiency and efficacy and improved the quality of response documents with approved, accurate, and up-to-date content. Plus, QorusDocs' built-in measurement tools provide powerful, data-driven pitch insights and reports that help the law firm track proposal activities and client engagement to improve its near-term decision-making and long-term forecasting.

"With QorusDocs, we've vastly improved the consistency and quality of our pitches and proposals," said a senior executive in the pitch team at the firm. "Searching for content is easier and productivity has improved. In fact, the central repositories, templates, and built-in branding have been gamechangers for us."

With QorusDocs, business development and proposal teams can create pitches and proposals in the familiar Microsoft Word and PowerPoint applications, reducing team members' stress and frustration, boosting productivity, and minimizing the learning curve for new users of the proposal automation tool.

She added, "Being able to effectively collaborate with team members worldwide has transformed our pitch process; the ability for folks to work on documents simultaneously is critical for tight deadlines—and the automated reminders are always helpful, even if ignored on occasion!"

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Feedback on the QorusDocs software has been positive, with a 70% adoption rate across the pitch and business development teams. “The initial implementation involved a vast amount of content, high pitch volume, and a significant number of new employees which created a challenging environment—but one we overcame with the help of the QorusDocs team,” noted the global pursuit teams leader at the law firm. “Service and support from QorusDocs during the rollout was outstanding and involving IT on the firm side was also critical for success.”

The Impact

Increased Productivity

The AI-powered QorusDocs solution automates pitch creation to save hours of wasted time searching for content spread out across countless data stores. With fast and easy access to up-to-date content and templates and streamlined collaboration with geographically dispersed colleagues, the pitch team accelerated its pitch and proposal processes to drive growth.

Single Source of Truth

With direct access to the CRM, the QorusDocs solution provides a centralized content hub that brings together the firm’s vast volume of data—from the latest attorney bios, experience summaries, practice descriptions to industry expertise, capabilities, firm boilerplate—in one place to save time and effort and improve the quality of pitches with accurate, branded content.

Streamlined Proposal Process

QorusDocs proposal management software eliminated collaboration roadblocks at the firm. The pitch team can collaborate efficiently across the firm’s global offices to create professional proposals without leaving the familiar Microsoft Office applications or DealCloud CRM.

Ease of Use + Top-notch Support

The QorusDocs solution provides a simple, intuitive user experience for the pitch team, generating positive feedback and a 70% adoption rate to date. Outstanding support and service from QorusDocs eased any potential hurdles during the implementation process.

See QorusDocs in action!

Simplify your proposal process and spend more time with clients.

Let’s Talk

For more information please visit:

www.qorusdocs.com | info@qorusdocs.com

+1 425 708 8461

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About QorusDocs

QorusDocs is a Bellevue, WA-based leader in AI-powered proposal management and RFP response software that automates the creation of personalized pitches, presentations, proposals, and RFP responses. QorusDocs allows business development, sales, marketing, and proposal teams to collaborate seamlessly, optimizing billable hours and increasing client wins. The company supports enterprise revenue teams from companies like CDW, DLA Piper, Kramer Levin, Axon, WSP, Insight, and more.