



Becoming a connected firm

Uniting People, Processes, and Data for
Better Business Performance



Wilson Allen is a leading provider of software and services that help law firms and professional services organizations improve business performance.

- **Client Development & Intake**
- Financial & Practice Management
- Billing & Operations
- Data & Analytics
- Training & Adoption

Thriving in Today's Hyper-Competitive Environment

The level of competition in the professional services industry is higher than ever. Clients are putting pressure on rates and demanding new and different fee agreements. Everyday use of technology has shaped expectations for seamless, transparent, and compliant administration of engagements. In this hyper-competitive environment, client service has become a key differentiator that can make or break relationships, whether new or long-established.



These changes are driving firms to realize that what worked before may no longer be applicable. Firms that will endure and thrive are focusing on modernization – with a key distinguishing characteristic being connectedness:

- Connected teams working from many geographies
- Processes that bridge departments, connect collaborators and approvers, and enable the most efficient inception of clients and matters
- Connected data stores that position the firm to inform business development and marketing with the richest, most useful information about the firm's experience and capabilities.

Enabling the connected firm is an area of specialization for Wilson Allen's Client Development and Intake practice.

When you're ready to modernize, we're here to help.

Enabling Clarity Across the Client Engagement Life Cycle

At Wilson Allen, we've integrated two previously separate practices that provide services and solutions to support customer relationship management (CRM) and new business intake processes. Our newly formed Client Development & Intake (CDI) practice offers a team of specialists with expertise across the entire engagement life cycle to drive greater insight and collaboration.

We bring together knowledge of marketing and business development, intake, risk management, and client acceptance, with data insight and governance at the heart of the discipline.

We've created one connected team for the connected firm.

What's in a name? Client Development & Intake reflects our belief that firms should connect these disciplines, both from a data and operational perspective, to compete more effectively.

Bridging Departmental Divides

Most professional services firms organize operations by department, which often results in the segregation of data. The people entrusted with the inception of new business and tasked with protecting the firm's legal, reputational, and financial risk maintain data in an intake database. Those charged with marketing and business development maintain data in the firm's CRM system. There are many reasons firms should connect these disciplines, both from a data and operational perspective, as described in the figure below.



Connecting the intake and CRM databases helps marketing and business development teams understand the corporate structure, reputational aspects, and financial characteristics of prospects.



With access to data from the business inception team, the marketing organization can learn which companies and industries are fair game and which are off-limits.



Most firms license valuable third-party data for new business inception that could inform marketing strategy. With a connected business strategy, this data can be put to better use.



Beginning client and matter inception in the marketing and business development organization, firms can nurture new business opportunities until they become actual engagements.

Fig 1: Reasons for Firms to Connect Client Development and Intake

Driving Greater Insight, Collaboration, and Client Success



Wilson Allen's specialists enable firms to use systems, data, and analytics more effectively to leverage insight into clients, targets, and opportunities. As a result, your firm is better able to use data to make smarter business decisions.

Risk and Compliance Expertise

With over 20 years of subject matter expertise, our team of specialized consultants and engineers brings a wealth of knowledge to risk implementations. Our clients span from large global organizations to localized boutique firms with complex needs. With over 300 implementations under our belts, we've created

best-process approaches to everyday needs across the industry, helping firms deploy new technology and revised processes quickly and successfully. We apply our domain knowledge to advise on best practices based on your firm's current approach to intake and on your objectives.

CRM Expertise

With a focus on excellence, Wilson Allen helps professional services firms make the best use of CRM technology. Our team has completed more than 200 CRM projects for firms worldwide and has created a portfolio of best-in-class services and solutions.

What differentiates our capabilities is a unique mix of strategic consulting expertise and an unrivaled technical team skilled in CRM integrations, report building, training, and data management and data quality services.

Specialized Expertise Across Systems, Processes, and Data

Expertise	Systems, Processes, and Data
Risk	Consulting and software implementation for risk analysis, independence, and compliance
Systems	OnePlace Marketing & BD - Intapp CRM; Intapp Experience. OnePlace Risk & Compliance - Intapp Conflicts; Intapp Intake; Intapp Terms; Intapp Walls. InterAction. Salesforce. Peppermint. Microsoft Dynamics. Foundation. iManage (Business Intake, Conflicts, Records Manager)
CRM and Experience	Consulting and software implementation for business development, experience management, pursuit, and pitch development
Data Management	Segmentation, quality, and governance
Workflow Automation and Integration	Workflow orchestration and data governance
Intake	Consulting and software implementation for onboarding processes, workflow routing, and approvals
Terms	Consulting and software implementation for management of outside counsel guidelines, contracts, terms, and policies
Ethical Walls	Information governance consulting and software implementation

By connecting business development, marketing, and new business intake, your firm is in a better position to break down silos and win.

Wilson Allen At a Glance



43 of the
UK TOP
100
law firms

78 of the
Am Law
100
law firms



14 of the
global top 50
Law Firms

10 of the
top
CANADIAN
Law Firms

Better Connections. Bigger Benefits.



The firm's experience is more than the sum of the partners' expertise. Bringing together data from financial systems, the document store, new business intake systems, and business development systems positions the firm to compete based on its collective wherewithal. Informing business development with the firm's full range of data makes RFP response, content strategy, and website maintenance much more efficient.

Learn More

To see how Wilson Allen can help your firm compete more effectively by uniting people, processes, and data across the client life cycle, [please contact us](#).