



Experience management at Osborne Clarke:

A strategic approach to business development and growth

Osborne Clarke is an award-winning international legal practice. Over the past few years, the firm has grown rapidly, with 25 offices around the world. The core sectors the firm works in all thrive on innovation: digital business, energy, financial services, retail, life sciences, real estate, recruitment, and transport.

Challenges of rapid growth

Rapid growth of a law firm brings with it many challenges, often pushing existing operational processes to their limits.

For the Business Development and Marketing team at Osborne Clarke, a major challenge was gaining visibility into work performed throughout the firm – across practice areas, sectors, and offices. As the firm's business continued to scale, it was taking more time to compile credentials presentations, and to prepare for pitches drawing on relevant examples of the firm's current and past work. Many team members were trying to keep track of this information using spreadsheets, which weren't comprehensive and required a lot of time to maintain.

To address this challenge, the Business Development and Marketing team formed a committee together with key stakeholders from IT, Communications, and Finance to evaluate possible solutions that would help the firm's ability to develop new business and cross-sell.

Selection and implementation

After evaluating solutions from several vendors, the team decided that Intapp Experience – a new experience management system developed by Intapp – did the best job of addressing the key internal stakeholder requirements. The system is simple to use and doesn't require extensive training, satisfying a key requirement for lawyers. It is also versatile and is designed to be used flexibly by different stakeholders, satisfying a key requirement for Finance. And finally, it integrates well with the firm's other systems, satisfying a key requirement for IT.

Intapp Experience is designed to help firms win more business by providing a more comprehensive view of work performed by the firm across practices, sectors and jurisdictions.

By capturing information on current matters and projects and making it searchable, Intapp Experience avoids the need for extensive data entry. At Osborne Clarke, relevant client/matter data is captured via the firm's new business intake and time recording systems, which are also based on the Intapp Professional Services Platform. The system is triggered by any matter worth over £25,000 that hits over 75% of fees, so that all the information is available and can be used as part of any sales and marketing materials.

The first phase of implementation was completed in May 2017 when Intapp Experience was rolled out to a quarter of the firm's UK business for presentations and pitches.

With deeper insight into the types of current and past projects and matters the firm has worked on, the Osborne Clarke team is better positioned to fully leverage the firm's experience in response to RFPs and other client requests, and market and differentiate the services the firm offers.

"The personal interaction and customer care we've had from Intapp is first class."

RICHARD CLIFF, HEAD OF BUSINESS DEVELOPMENT

Executive summary

Osborne Clarke, an award-winning international legal practice, deployed Intapp Experience to help the firm win new business and grow business with existing clients.

Challenge

- Improve visibility into work performed throughout the firm to inform credentials presentations and pitches, and help Marketing and Business Development work more efficiently
- Introduce a solution that won't require extensive training and enables lawyers to cross-sell with confidence
- Avoid the need for extensive manual data entry

Results with Intapp

- Intapp Experience captures information on current matters and projects and makes it searchable
- Provides a more comprehensive view into work performed by the firm across practices, sectors and jurisdictions
- Enables a more rapid response to RFPs, pitch presentations and other client requests, with more targeted, differentiated information to help win more business
- Centralises information so that Marketing and Business Development no longer need to maintain multiple spreadsheets to track information and can focus on providing more strategic value
- Captures client/matter data via the firm's new business intake and time recording systems; doesn't require extensive data entry
- Also provides lawyers with visibility into the firm's broader capabilities and experience – without requiring extensive training – and enables them to cross-sell additional services to existing clients



"Intapp Experience provides us with accurate information...highlighting examples of past work relevant to new business opportunities, cross-selling, and collaborating more effectively across the firm."

RICHARD CLIFF, HEAD OF BUSINESS DEVELOPMENT

Business impact of Intapp Experience

Richard Cliff, Head of Business Development at Osborne Clarke, shares, "With the growth of our business in the UK and internationally, we have a wealth of expertise to offer our clients. Intapp Experience provides us with accurate information and visibility, enabling lawyers as well as the marketing and business development team to make the most of our collective knowledge by highlighting examples of past work relevant to new business opportunities, cross-selling, and collaborating more effectively across the firm."

As of February 2018, over 1,000 credentials have been stored centrally, and 91% of all requested matters are profiled at Osborne Clarke.

The team is now working on deploying the system to lawyers. With improved visibility into in-depth profiles of individuals throughout the firm, lawyers will be better equipped to provide clients and prospects with an understanding of the firm's broader capabilities and experience, and cross-sell additional services to existing clients.

Internal feedback from key stakeholders – including the executive board – has been overwhelmingly positive, with many firm leaders recognising the strategic value of Osborne Clarke's experience management system. Over time, the firm expects to use the data compiled from Intapp Experience for analytics and to identify potential growth opportunities for individual clients, matter types and jurisdictions.