

Allen Matkins boosted event attendance by 20% while improving attendee quality

By leveraging the power of Intapp Relationships, the firm was better able to target invitations for its marketing events while cutting the time its lawyers spent vetting attendee lists.

Allen Matkins

A California-based Am Law 200 law firm, Allen Matkins has served real estate, litigation, labor, tax, and business-law clients since 1977. Allen Matkins employs more than 20 lawyers, and maintains offices in Los Angeles, Orange County, San Francisco, and San Diego.

Poor data had yielded poor results

Allen Matkins Leck Gamble Mallory & Natsis LLP – an Am Law 200 firm – hosts a number of industry-specific events as part of its firmwide marketing strategy.

Allen Matkins struggled to attract the right attendees, primarily because its lawyers were reluctant to review attendee lists due to their overwhelming size and outdated information. Too many stale contacts remained, and new contacts hadn't been properly added.

The firm tried a variety of tactics to engage their lawyers in the data-validation process and to create effective mailing lists, all without success.

Software inspires a novel approach

The firm already used Intapp Relationships to support business development efforts, by pinpointing high-value contacts and relationships.

Helen Rizzo, Allen Matkins's marketing technology administrator, searched for ways to boost the potency of the firm's mailing lists. Inspired by her team's experiences using Intapp Relationships to surface actionable relationship insights, Rizzo devised a new approach to the firm's list-quality challenges.

Rizzo cross-referenced InterAction sponsorship lists with Intapp Relationship reports, then applied Intapp Relationships filters focusing on contacts with high relationship scores. She used the resulting Intapp Relationships list to pare down and optimize the firm's InterAction sponsorship roster, winnowing down prospective attendees to include only those who were both highly valuable and easily reachable.

"We were blown away," said Rizzo. "It was such a simple solution."

Executive summary

Allen Matkins, a California law firm with more than 200 lawyers across offices in four cities – used Intapp Relationships to dramatically boost the quantity and quality of attendees at its marketing events while also cutting the time spent by lawyers vetting invitation lists.

Challenges

- Marketing events weren't drawing enough high-level attendees
- New CRM records weren't being added, and many stale records weren't removed
- Lawyers were reluctant to invest time vetting lists due to their age and size

Results with Intapp Relationships

- Higher event attendance: 20% improvement year over year
- Better-quality contacts: 83% of newly added records were decisionmakers
- Reduced vetting timeframes: Attendee lists given to lawyers for validation shrank up to 75%



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HELEN RIZZO, MARKETING TECHNOLOGY ADMINISTRATOR,
ALLEN MATKINS

Intapp Relationships provides measurable results

In preparation for Allen Matkins's anniversary reception, Rizzo used Intapp Relationships to generate optimized lists. Filtered through Intapp Relationships, rosters of potential attendees shrank by up to 75%. And, because their workloads were made more manageable, the firm's lawyers were able to focus on crafting the right list of invitations, rather than wading through outdated data. This collaboration between marketing and lawyers paid off measurably: year-over-year event attendance jumped by 20%.

Rizzo again deployed Intapp Relationships to generate the attendee list for Allen Matkins's annual View from the Top event, a pivotal California real-estate gathering. Because of the event's exclusive nature, event outreach focused on attendee quality – high-level decisionmakers – over sheer quantity.

After using Intapp Relationships to streamline contacts, the newly optimized attendee lists were vetted by 78% of the firm's lawyers – a dramatic improvement compared to the firm's previous low participation. Those lawyers removed 534 stale contacts and added 401 new ones. Even better, more than 80% of newly added contacts were decisionmakers – vice presidents and above – a crucial win for the event's goals.