

# The 21<sup>st</sup> Annual Law Firm COO & CFO FORUM

## Partner Talk #3: Diamonds in the Rough: Uncovering the Hidden Value of Client Intelligence



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# Diamonds in the Rough:

## *Uncovering the Hidden Value of Client Intelligence*

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## Searching for Diamonds...



One man's story...



# What is Client Intelligence?

Choose your own adventure!! Each time it's a different path with different outcomes.



Client intelligence enables your teams to be in the best position to **find, win, and grow** more business by proactively equipping them with the right information, relationship intelligence, and actionable insights inside the tools they use every single day.

Client intelligence taps into **one of the most valuable firm assets** you have – **relationship capital**.

# The Hidden Value of Client Intelligence

Client intelligence helps you maximize value, exceed client expectations, and drive sustainable growth – it can catapult your firm beyond your competitors to **generate millions of dollars in additional revenue** over the next 3 years.



# Turn Insights Into Revenue

Identify at-risk clients and uncover new areas of growth across your existing portfolio.

## Whitespace Insights

Uncover new areas of growth opportunity within your existing client portfolio by targeting untapped accounts, industries, or regions where you have established relationships, but little to no incoming revenue.

## Relationship Insights & Multithreading

Quickly reveal who-knows-who throughout your organization to establish alignment and influence with existing or prospective clients. Gain a line of sight into who you are influencing across departments and seniority levels.

## Champion Tracking

Mitigate risk to client accounts by identifying when your key contacts change roles, leave the company, or join a new one. Leverage these changes to pursue and win new business and/or accounts faster.

## Time Coach

Optimize productivity and performance by visualizing how staff members are spending time on revenue generating activities to recommend the best practices that are proven to make and even exceed plan.

## What Law Firms are Saying...

Stand out by delivering the **right message** at the **right time** to the **right person** – all driven by a keen understanding of where relationships, influence, and trust have already been established.

*“The idea of being able to drill down into where we invest our time, allows us to maximize our firm’s ROI.”*

“[This technology] enables our firm to focus on the future and collaborate with clients to explore creative ways to break new ground, advance our service offerings, and deliver more value to our clients.”

“We use the platform to confirm client information, identify updated jobs for existing clients, and provide our attorneys with a tool to better identify and collaborate on cross-marketing opportunities.”

*“[This technology] provides insights and updates into client relationships that would otherwise take countless research hours to obtain.”*



Thank you!

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