



INTERACTION® CASE STUDY

## Kilpatrick Townsend & Stockton LLP

# Taking Business Development to a Higher Level



***I report to the firm's Management Committee and InterAction Business Edge really has been the foundation for business development reporting"***

– Randy Pulley, Director of Business Development, Kilpatrick Townsend & Stockton LLP

Randy Pulley knows what it's like to track business development the old-style way.

Like many firms, Kilpatrick Townsend once kept tabs on their pursuits and opportunities through a single spreadsheet document on a shared drive. For a BD veteran like Mr. Pulley, it wasn't hard to pick apart the flaws in the process.

"If you think about the flutter of activity that happens in marketing and business development reporting, you have people that are entering new opportunities, you have people that are making updates, and you have people that are just making changes constantly. When you only have one file, only one person can make a change at any one time."

"We needed a tool that allowed multiple people to make edits at any one time and that was easy to access, that was on, say, the cloud."



***We wanted something that allowed us to see more trends, more data, more analysis"***

After more than 15 years' experience with the InterAction® CRM solution, Mr. Pulley's firm accepted his recommendation to build on their established customer relationship management platform and extend their BD capabilities to the cloud with InterAction Business Edge.

"Business Edge was a no-brainer to me," he said. "Some people don't necessarily think about the lifecycle of opportunities. They tend to think of the BD process as a series of projects. They get the pitchbook or proposal out the door and move on to the next project. You're only halfway there at that point. You need to stay in front of the client until they make a decision. Win or lose, there is always a next step. Either way, you should build on the relationships and the research you put in."

"We knew that there were a lot of great things that Business Edge would do for us, and we wanted to just jump right in. As we implemented Business Edge, we went back and input just the last three months of data. That way we could get started faster and start seeing some of the ways the program operates."

"It takes a lot to get attorneys to buy in to what you're doing, so we wanted to make sure that we didn't make mistakes. We also knew going forward that we would be inputting new data, so in just three more months, we would have six months worth of data."



***Business Edge helps team members follow pursuits all the way through a client decision”***

For a BD pro like Mr. Pulley, even losses are opportunities.

“If we don’t win a particular opportunity, we push to understand what we’re doing to continue those relationships. Business Edge helps our team members gain a better understanding of the need for follow-up. They’re more mindful that the pitchbook or proposal is only the halfway point. We want our BD team members to stay involved in pursuits and maintain a good understanding of client development and opportunities. Always assume you’re losing. Assume everyone is voting against you until you truly confirm we have the client’s support.”

“We reach out to attorneys all the time after the proposal has been sent out and we’ll ask, ‘Hey have you reached out to this client? Have they made a decision? What can we do to keep this moving forward? Somebody has to win it, why not let it be us.’”



***Business Edge has really helped us be mindful of potential conflicts as well”***

One of Mr. Pulley’s greatest challenges before Business Edge was being able to stay on top of what every attorney had going on at any one time.

“Oftentimes in a firm our size, you have attorneys that are pursuing opportunities on their own and they don’t always necessarily communicate what’s going on. If not careful, attorneys could spend time and energy on prospects and they get really excited that they have this opportunity and it’s really painful to say, ‘There’s a conflict. You really can’t go after that.’”

## Client Snapshot

### Kilpatrick Townsend & Stockton LLP

#### CUSTOMER PROFILE:

Kilpatrick Townsend is an Am Law 100 firm based in Atlanta, GA, with 16 US offices and 3 international offices. With more than 650 lawyers, the firm’s service areas include bankruptcy, business & finance, construction & infrastructure, government & regulatory, intellectual property, labor & employment, litigation, and tax.

#### BUSINESS SITUATION:

With business development activity happening simultaneously across the firm, Kilpatrick Townsend’s Director of Business Development knew there was a better way to track and manage it all. The firm traded their single spreadsheet for InterAction Business Edge – a solution that allowed multiple people to make updates at the same time, from anywhere. It also allowed firm leaders to gain full visibility into business development activities.

#### SOLUTION:

InterAction Business Edge

#### BENEFITS:

- Access business development information in real-time, from anywhere
- Make strategic decisions backed by data
- Leverage dashboards and reporting for improved tracking and analysis
- Win more business from new and existing clients

“Now we leverage Business Edge to start reviewing pursuits earlier so we can raise opportunities up to the Management Committee, who can help keep attorneys from spinning their wheels.”

“The Management Committee has a great view of what’s going on across the firm and they might say, ‘There’s a potential conflict with this client. Let’s be mindful of that going forward.’”



***We share data with key stakeholders like Management Committee members, Office Managing Partners, and Practice Team Leaders”***

As the Director of Business Development, Mr. Pulley answers to the leadership team about the firm’s progress.

“With Business Edge, I’m able to show them what’s going on in certain offices and practice teams. I can explain to our leadership where the wins are, where the losses are, and where there are obstacles.”

“They’re looking for information that is relevant to them, key information like due dates, tasks, a good description of what the opportunity is, next steps and that sort of thing. Thanks to Business Edge, the right hand and the left hand know what each other are doing and the Management Committee knows what’s going on as well.”

*To learn more, visit [interaction.com](http://interaction.com)*

## **InterAction - Leading CRM for Law Firms**

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### About LexisNexis

LexisNexis® (lexisnexis.com) is a leading global provider of content-enabled workflow solutions designed specifically for professionals in the legal, risk management, corporate, government, law enforcement, accounting, and academic markets. LexisNexis originally pioneered online information with its Lexis® and Nexis® services. A member of Reed Elsevier [NYSE: ENL; NYSE: RUK (reedelsevier.com)], LexisNexis serves customers in more than 100 countries with 10,000 employees worldwide.

### About InterAction

InterAction® (interaction.com) is the leading provider of CRM software and services, which enable professional services firms and other relationship-based organizations to create the relationship intelligence they need to uncover new business opportunities.

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