

Making pitches work

'It's perfect'

A look into the pitching process for top law firms: how they currently operate and how they are improving processes.



enableplc.com/pitchperfect

Ideas into practice

Liam Flanagan

AS PROVIDERS OF AGILE TECHNOLOGY AND BUSINESS CONSULTING TO LAW FIRMS ON FOUR CONTINENTS, ENABLE IS AT THE CUTTING EDGE OF DEVELOPING IDEAS AND PUTTING THEM INTO PRACTICE: WE DELIVER THE BEST NEW GENERATION TECHNICAL SOLUTIONS TO HELP PEOPLE LIKE YOU WIN NEW BUSINESS FOR YOUR LAW FIRM.

Having worked with many of the world's leading law firms, we know how important it is to achieve the best outcome for our clients. We therefore understand the challenges facing you in delivering the best outcome for your clients.

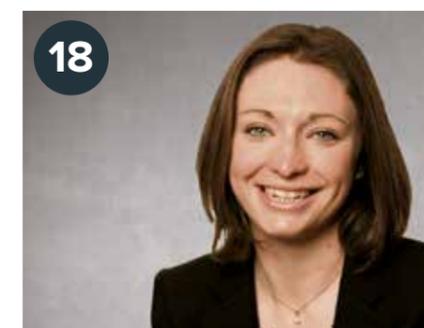
Innovation is what drives us to provide technology solutions such as PitchPerfect: a resource for attorneys and law firm leaders who want to develop their practices and gain competitive advantage. But innovation means nothing if it is not reinforced by first rate service and support.

In examining the problems of producing the perfect pitch for clients and potential clients, this guide shows how PitchPerfect can deliver the right solutions that you need to make your marketing and business development team more effective and more efficient.

When helping to deliver business critical projects, we have a proven track record as a trusted partner. From the experience of our existing law firm clients, our passion for client satisfaction and service is self-evident: a distinctly personal approach to project and product implementation which provides bespoke solutions to individual problems.



LIAM FLANAGAN
Founder & Chief Executive
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This magazine is printed using vegetable based inks by Optichrome, an ISO 14001 and EMAS accredited company.

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Dominic's clients say that they improve their results when they improve their communication skills – this is what he helps them to do. For further information, please see: dominicarman.com



In Pursuit of the Perfect Pitch

By Dominic Carman

BY PROVIDING INNOVATIVE IT SOLUTIONS, THE ENABLE TEAM UNDERSTANDS THE CRITICAL IMPORTANCE OF CREATING HIGH QUALITY PITCH DOCUMENTS. WHAT FOLLOWS IS A BRIEF OVERVIEW OF HOW LEADING PRACTITIONERS VIEW THE PROCESS.

The relentless pursuit of the perfect pitch is a continuous quest for every law firm. Any legal marketing professional knows this to be self-evident. For lawyers, as well as for marketing and business development professionals supporting them, success critically resides in their ability to sell themselves, their team, and their firm via a managed flow of well-crafted pitches that stand out from the competition.

So what defines a law firm pitch?

In summary, it is any competitive formal opportunity to respond to an invitation to tender, or a proposal request. Pitches are increasingly evaluated by dedicated procurement teams of non-lawyers as much as by general counsel. This includes the ubiquitous panel pitches. Most pitches have three sequential elements: the pre-pitch process, the pitch document and the client presentation.

According to Richard Grove, Director of Marketing & BD at Allen & Overy (A&O), the key question is: "How the hell do you differentiate yourselves?" Given such intense pressure, what can partners do to address Grove's question and perfect their pitch so that it stands out above the rest?



Richard Grove, Director of Marketing & BD, Allen & Overy

Alongside partners, firms use specialist pitch teams to work strategically and seamlessly (how often do you read those words?) to achieve the best win rate. Specialists say that pitch volumes – formal and informal, proposals, requests for proposals, invitations to tender for getting on panels and for individual pieces of work – have increased dramatically. According to Adam Soames, head of clients and markets at Hogan Lovells: "They have grown exponentially and continue to grow exponentially."

Pre-pitch process

Once invited to pitch, a firm's response is multi-layered, beginning with the pre-pitch process: getting to know exactly what the client wants and needs, the role of legal and procurement

functions and the selection criteria – aka scoping. This is also used to establish which other firms are in the frame and to identify precisely what the work involves. "Scoping can provide the edge against the competition," explains one marketing director. "When done effectively, you can influence the evaluation and uncover information to hone your proposition."

Gaius Powell, director of business development at Pinsent Masons, advises: "Have scoping calls as much as you can with the client or target ahead of submitting the document. That gives you a greater feel for the nuances: trying to understand what the client wants to achieve commercially." If it's an existing client, he adds, those discussions can be quite open. "You want a dialogue – not a monologue – and clients want that, too."

At A&O, which makes around 9,000 pitches a year firm-wide, "it's what you do before the pitch that matters as opposed to the pitch itself", argues Grove. "Every client will have a preconception of the winner so it's enormously important that the relationship management has taken place. We encourage our pitch teams and lawyers to engage the client in the creation of the pitch."

He develops Powell's point: "You should be on the phone to the client and any number of contacts in that client continuously, to the extent that, if you haven't started to irritate them with the number of calls that you've put in, you probably haven't done enough."



Every client will have a preconception of the winner so it's enormously important that the relationship management has taken place."

Pitch and sell

Traditionally the centrepiece of the process, the pitch document is now widely regarded as a vital stepping stone to the presentation. If your pitch is below standard, you simply won't make it to the next stage.

Along the way, the pitch document has evolved and fragmented into myriad forms. The variety is enormous, says Matthew Fuller, Director of Business Development & Marketing, EMEA at White & Case. "Project pitches tend to be longer and more complex," he

explains. "At the other extreme, it may be a short email with a fee quote. For a capital markets transaction, it's very specific: there is a market price. It will last only a matter of days whereas a project can go on for years."

Length will vary, and is often prescribed by the client, but 10-20 pages are the typical parameters for a standard document. Panel pitches usually allow two to three weeks' response time, but "at the extreme in the finance area", says Fuller, "you'll occasionally get told that they want it by the end of the day."

He offers a clear critique: "It's a sales document; all pitches are sales documents. That's the most important thing: we have to show off our wares." His sales mantra – focus on benefits, not features – finds common cause.

But Soames disagrees: "I don't see it as a sales document. I see it as a buying document: buying criteria and selection criteria will vary according to the situation." At White & Case and at his previous firms, Herbert Smith Freehills and A&O, Fuller has "noticed that putting in tons of credentials doesn't go down well with clients." The two things clients look at, he suggests, are the executive summary, which should be on one page, and the fee proposal: time needs to be invested on those two elements.

"Many firms, I suspect, spend too much time assembling CVs and credentials at the back-end and not focusing on the important things – the key selling messages and benefits to the

To manage the pitch process holistically, says Soames, Hogan Lovells has a decision map to assess pitch opportunities, "because you don't necessarily always know the full scope of what's being asked and what's required. The easiest way of increasing your win rate is to go for more pitches that you know you've got a better chance of winning." In summary: ask lots of questions, find out as much as you can, assiduously cultivate relationships, and critically evaluate each opportunity.



Adam Soames, Head of Clients & Markets at Hogan Lovells



The best presentations are where there is dialogue. The less they are an interview and the more they're a conversation, the better. It often comes down to trust."

client," says Fuller. In response, Grove adds: "I don't see it as a pure numbers game. Our worst nightmare is to find ourselves only competing on price, as it would be for most law firms."

So how critical is price to success? "I'm not sure that proposal documents always win you pitches, but they can lose them for you if you don't answer the questions," says Soames.

The golden rule seems to be: stick with what the client has asked for in terms of format, but avoid regurgitating boilerplate material – especially when timescales are tight.

Some firms use infographics or videos to enhance the appeal of their pitch document. But no matter how alluring a video or aesthetically pleasing a document may be – there is no substitute for seeing lawyers in the flesh. "For non-clients, the document is the door opener. But it's not often that the document is the decider; it's the presentation," says Powell. Fuller explains: "Only a minority of pitches go to a beauty parade; they tend to be the larger and more complex ones."

'Rehearse, rehearse, rehearse'

Preparation may be everything, yet Grove advocates telling stories in the form of testimonials: "I'm not sure it's true to say we train our lawyers, we don't use the word training, we use coaching, and we rehearse." Partners' presentations are filmed so that they can be advised and coached on their technique. A&O also plays back success stories: partners telling their story to their fellow partners to demonstrate 'from the horse's mouth' that it works.

"We run a lot of internal training and put lawyers on external training," says Fuller. "It's recognised as a key part of the development of their careers. They can't just be good lawyers, they have to have client development skills, as well." Increasingly, White & Case associates are trained alongside partners. "One of the adages that we use here is: rehearse, rehearse, rehearse," explains Soames. "We see it as vital to make sure that our teams are preparing effectively for pitches."

Carol Kennedy, Head of Pitch at DLA Piper, suggests that "less is more" in presentations. To achieve this, DLA tries to make rehearsals "as realistic and lifelike as possible. We like to run a number of rehearsals well in advance of the presentation." Often these are virtual, with partners from different offices participating. The real value in rehearsing, says Powell, is that it helps lawyers go in to the presentation confident and self-assured.

Put simply, suggests Grove, it's all about making them like you. "The presentation should not feel like a presentation, it should feel like a dialogue with the client," he says. Powell agrees: "The best presentations are where there is dialogue. The less they



Matthew Fuller, Director of Business Development & Marketing EMEA, White & Case



Carol Kennedy, Head of Pitch, DLA Piper

are an interview and the more they're a conversation, the better. It often comes down to trust."

Kennedy cites another sales mantra: people buy from people they trust. Grove tells an instructive tale in terms of how to approach a presentation: "We did an enormously helpful exercise. We asked our partners: to what extent do you believe you should be advising your client on their strategic business issues? There was some reluctance to do that; they were focused on the matter.

"We then asked our clients the same question: do you expect your advisers to provide non-technical legal advice relating to your strategic business issues? To which the answer

was almost unanimously: yes. There was a sea change in attitude once we played that back to partners. It wasn't just us reading the book of best practice; it was hard evidence."

Pitches are won or lost but, but feedback still matters. "Feedback is gold dust," says Kennedy. "Debriefs are learning opportunities and the outputs can be leveraged to drive continual improvements. It's equally important to find out what we did well after a win as what we didn't after a loss."

Feedback can also help inform firms' future pitching strategy. Sometimes it is price, but at other times, price is used as a reason to avoid any further discussion. Often with a bit of probing, effective marketing

professionals can discover other aspects. In many firms, feedback information is gathered and centrally analysed to look at trends, such as whether pitches are lost on price or relationships.

Pitching: the future

As client demands become ever more sophisticated and the response timeframes ever shorter, where does pitching go from here?

Grove predicts: "There will be a greater degree of what I call 'best of breed' pitching, fragmentation: clients will have a requirement, which can then be sliced up into a number of different disciplines or sub-disciplines.

"That then leads you on to something we will see a lot more of: the requirement for project management on the front-end. Not only will firms need to provide a degree of project management in large and complex matters, but they will also, in some cases, be required to project manage several contributors to the service required by the client."

Soames takes a different tack: "There is a divergence in approaches. On the one hand, you are seeing an increasingly creative, bespoke approach to pitches and presentations. On the other, you've got a backdrop of clients wanting to manage the processes much more tightly, which shuts down creativity, so we will see an increasing prevalence of the template, standardised approach."

Whichever dominates, effective pitching will remain integral to every partner's skillset. A final mantra? Practice makes perfect.

This is an updated version of an article by Dominic Carman (see: dominiccarman.com) which originally appeared in Legal Week.

About PitchPerfect



ENABLE'S FLAGSHIP PRODUCT, PITCHPERFECT PROVIDES A UNIQUE SOLUTION TO THE CHALLENGES FACED BY BUSINESS DEVELOPMENT DEPARTMENTS WITHIN LAW FIRMS.

Using a ribbon in Microsoft Word, it delivers innovative software which does the heavy lifting in the fast generation of branded marketing documents, making the process as easy and as fast as possible. In delivering your pitch quickly, efficiently and stylishly, PitchPerfect gives you much more time and takes much less effort.

To date, it is used or being implemented by leading law firms, including three Am Law 50 and Global 100, two top Australian firms, the world's second biggest offshore law firm, and several top 100 UK firms.

PitchPerfect can be implemented quickly (usually within three to four months), fulfilling your pitch building and proposal generation requirements in a sensible timescale. In the event of a merger, acquisition or strategy change, Enable fully commits to provide the required ongoing service.

Why PitchPerfect?

As the product of Enable's developed expertise and innovative technology, PitchPerfect delivers high quality, professional looking pitch documents in a fraction of the time compared to traditional methods. Enable take care of the layout and formatting of your templates, matching your brand guidelines, so that your team has more time to focus on valuable tasks, such as formulating winning pitch strategies.

By using Microsoft SharePoint as the CMS, PitchPerfect encourages firms to centralize their pitch content and streamline the way in which they store, manage and update their information. This then links seamlessly into Word or PowerPoint, steering clear of wizards and other applications that obstruct the flow while minimizing document corruption, and the duplication of content and effort.

More than just a pitching solution

Although pitching is where PitchPerfect first established roots, its application has extended into other areas of marketing collateral including flyers, brochures, bios, team sheets and directory submissions.

PitchPerfect is comprised of four components:

1. Highly engineered Microsoft Word templates to fit your brand and house style
2. SharePoint Content Management System
3. Intuitive User Interface via the PitchPerfect ribbon in Microsoft Word and PowerPoint
4. The Enable PitchPerfect Administrator



The proposal challenges you face as a firm

The Enable team fully appreciates and understands the multiple stresses involved in creating a winning pitch document: gathering information from a variety of sources; making sure that all the information is up-to-date; drafting new key client content; tailoring content to suit client issues and requirements; and working to a tight deadline. All of this is happening as many people try to work on the pitch document simultaneously.

Precious time is often spent dealing with formatting problems:

- Layouts altering and images changing position
- Inconsistent formatting
- Contents page not updating correctly
- Headers and footers misbehaving and section break nightmares

PitchPerfect provides the solution

Your team will no longer be fiddling with complex document formatting and layout issues

PitchPerfect enables you to insert content simply and directly into Microsoft Word or PowerPoint through the intuitive PitchPerfect Ribbon

It's no longer quicker to produce a pitch by starting from an old document with all the obvious risks. Every document created is entirely 'clean and fresh'

PitchPerfect makes it easy to insert, modify, re-order and remove content in your pitch documents

Through Enable's professionally designed templates, content is consistently placed into your documents using your brand layout and house style

PitchPerfect leverages your existing investment in Microsoft technologies, reducing risks associated with proprietary systems

Your valuable content is centrally stored in the PitchPerfect SharePoint 'back-end' ready for firm-wide access. Data is pulled from this one source into multiple business development documents so you are only required to keep the content up-to-date in one place

The PitchPerfect Ribbon is a communications middleware technology within Microsoft Word or PowerPoint that deals with the external data sources that are required to be inputted into the document templates



'It's perfect, I love that they think like that'

BAKER BOTTS LLP HAS APPROXIMATELY 725 LAWYERS PRACTISING THROUGH A NETWORK OF 14 OFFICES AROUND THE GLOBE. BASED IN ITS HOUSTON HEADQUARTERS, CHRISTINE JUNG IS THE FIRM'S ASSOCIATE DIRECTOR OF COMMUNICATIONS, OPERATIONS.

Baker Botts had an existing system for generating proposals. But, says Jung, it was not-user friendly; nobody used it. "We wanted something that everybody would use because every office was developing different proposals: they looked different, they had different content, they said different things, there was no branding and no consistency."

The firm's communications team examined several options. "We talked to Enable about PitchPerfect," says Jung. "When we tested it, we knew immediately that was it, because you don't have to go to another system, another browser, you simply open up Word and you're there. I thought: look how easy it is. And it's proved to be really easy in practice — if you can work Word, which everyone can, you can work PitchPerfect. We had immediate adoption. In December 2015, we rolled it out to our marketing business development teams across every office."

After the initial release, Baker Botts wanted to make changes to the product. "So we did," says Jung. "It's not an out of the box tool, it's very customized." In April 2016, PitchPerfect was released to more than 180 secretaries at the firm. Rather than having training sessions, videos ranging from 30 seconds to 3 minutes were recorded and posted on the firm's



“Someone in house came up against a roadblock. Enable jumped in and said: 'hey, we've got a solution, we can make this happen'. They have been just amazing to work with.”

intranet, providing mini tutorials on different aspects of the system.

Jung summarises the guidance given: there is a new tool available for secretaries, Client Relations has already been using it, here are the links to the videos. The Communications Team spoke with those managing the secretaries to ensure they were promoting it. "I set up a separate inbox to handle support," says Jung "and was surprised to find that there was none required. When we released it to the lawyers, they also had zero questions."

Problems solved

Since then, the firm has produced hundreds of proposals using PitchPerfect. "We use it in every office, across six practices: corporate, litigation, projects, tax, environmental, and intellectual property," says Jung. "Everyone uses it. The great thing is if I need to do a cross-departmental pitch, I have the content that different practices have contributed — I can pull it all into one proposal. We have solved so many problems with PitchPerfect."

Speed is another key benefit, according to Jung. "One of the biggest problems with our previous system was the time required to manipulate documents in initial preparation. With PitchPerfect, what would take hours to format previously now takes only

minutes. We often have changes. That used to be a very labour intensive undertaking - again hours, now literally minutes. That saves a lot of time which you can spend on developing your strategy." Unlike other systems, "PitchPerfect is so quick and easy, people actually use it."

In terms of flexibility and versatility, Jung explains that "whatever you want to do, PitchPerfect maintains the formatting, so you keep that standard look. If somebody in the London office gives a company a litigation proposal and two days later that same company gets a corporate proposal from the Houston office, they look the same, like they come from the same company."

This, Jung adds, provides very strong branding which differentiates the firm from the competition. These are very slick documents, they look nice, very fresh, professional, modern." Does this really matter? "Absolutely, it's your image. If your image is that you can't get a proposal together, then how do I believe you can get this merger together?"

'Great to work with'

When it comes to support, the Enable team is "great to work with," she says. "They are very intelligent, they know the business so if I have a problem, they work with us to create a solution. I requested something from Enable and they responded: I have an idea of how to make that happen. The next day, it was done. As far as getting data from the old system into this system, they were very creative."

"Someone in house came up against a roadblock. Enable jumped in and said: 'hey, we've got a solution, we can make this happen'. They have been just amazing to work with. Enable came at the problem from a completely different angle and said we are going to bulldoze this to the ground, start with something completely new, 180 degrees from what everybody else has been doing. It's perfect, I love that they think like that."

So what do their lawyers think of PitchPerfect? "Client Relations managers initially said: this will not work because my lawyer's very specific that we have to use a particular

template. Many people told us that. We responded: do one proposal on it, then come back and tell me what feedback you got. Unanimously, everybody said: this is amazing."

Happy lawyers

"We did a test run using a small group of lawyers and a few proposals.

"The word spread. We had lawyers coming to us saying: that proposal one of the partners did, where do I get that template? I want my proposal to look like his. I was getting that left and right — hilarious, because everyone told me it was going to be the complete opposite. I know they are using it because I see the final result."

Baker Botts built an integration from PitchPerfect to their intranet allowing everyone in any office can see every record of previous proposals and a link to the final PDF submitted.

"Many of the lawyers do not even know they are using PitchPerfect," says Jung. "It was completely seamless once we started using it, they did not notice the difference as far as usability because it was just another Word document to them. But they noticed the difference visually: how slick the documents are because previously we had awful, boring, text only proposals. Now, we have powerful quotes, imagery and so on. Very easy to manipulate and they are not having to wait for turnaround on edits, because it is such a better built template."

bakerbotts.com

enableplc.com/pitchperfect



Birketts

‘Let that be our starting point’

BIRKETTS IS BASED IN THE EAST OF ENGLAND WITH OFFICES IN CAMBRIDGE, CHELMSFORD, IPSWICH AND NORWICH. JANET RUDGE, THE FIRM'S BUSINESS DEVELOPMENT DIRECTOR, EXPLAINS THAT THE FIRM RECENTLY CHOSE PITCHPERFECT, WHICH IT HOPES TO LAUNCH IN LATE SPRING.

In creating proposals, Rudge outlines the type of work in which Birketts specialise: "We have a strong capability in property - across developers, investors, house builders - a strong corporate team, particularly in family and owner managed businesses, plus all the sectors that you'd expect to see in a regional practice in the East of England: with particular strength in motor retail, technology, charities, transport and logistics, food and agriculture, private client work and public sector, mostly education and health."

To service the firm's client base, she says: "We wanted to find a single data repository for things like CVs, work experience, credentials, testimonials." Creating pitch documents, she adds, had become "extremely time consuming: some of them were taking as much as 40 hours to complete. We had already built something within our intranet, but we couldn't produce documents from there so it had to be a cut and paste job, which wasn't really fit for purpose."

This made for limited options in producing pitch documents, as Rudge says: "Nobody likes to operate on the basis of just recreating a tender from the last one you did in that particular



sector - although, by and large, that was what was tending to happen. We were thinking: here's a tender, here's a proposal we've got for this sector, we know we did one three months ago for this opportunity. Let that be our starting point."

She points to a spectrum of different types of proposal requests that the firm receives: "They range from 'email me a quote' through to different opportunities - something that's just an enquiry, where we haven't had the opportunity to scope it properly and we might provide generic material - through to a full-scale proposal document."

Birketts decided to examine several different systems and, after careful consideration, shortlisted three separate pieces of software. "As a result, everyone in our working group came away thinking that PitchPerfect was the best of the lot," says Rudge.

It felt very intuitive, quite straightforward to use," she adds "We have a lot of experience in trying to roll out software which has all the bells and whistles. But when there is so much to them, they don't get used as often as they should. In looking for simplicity and flexibility, we felt that PitchPerfect offered us everything that we were looking for."

Rudge plans to roll out PitchPerfect by the end of April 2017. "We will try and make it as painless as possible: we've already got a decent bank of material, it's just finding it all and putting it into spread sheets," she says. "Initially, we plan to share that with the lawyers and say: here's your opportunity to update it to enhance it; otherwise, if you do nothing with it this is how it's going into the database."

Rudge will provide guidance to the firm's lawyers about improvements which they might make: "Number one



What we want as a team is to be more efficient and more creative with documents, proposals, team sheets — whatever we produce.”



on the list will be: can you make it shorter, a bit punchier. As a team, we have decided that we won't give the whole firm access to the PitchPerfect software immediately: we'd like to try and work out ourselves how we might manage consistency and keep track of the opportunities that we are put in front of and responding to."

From what she has seen so far, PitchPerfect is "quick, versatile and easy to use." This is a distinct advantage

given that some of the tenders undertaken by Birketts take a long time to assemble. "That was a key driver for choosing PitchPerfect," says Rudge.

She summarises what the firm anticipates PitchPerfect will deliver to its future business development efforts: "What we want as a team is to be more efficient and more creative with documents, proposals, team sheets - whatever we produce. But putting the document together was taking so much

time, we didn't have that luxury.

"The idea of having something like PitchPerfect that makes it easy to assemble the bare bones of a document will give us more time. The more time you can spend on bespoke elements, the greater your chances of success."

 birketts.co.uk

 enableplc.com/pitchperfect

Using PitchPerfect



PITCHPERFECT ALLOWS YOU TO CREATE DOCUMENTS DIRECTLY FROM WITHIN MICROSOFT WORD AND POWERPOINT. THE PITCHPERFECT RIBBON CONTAINS THE FUNCTIONALITY THAT YOU NEED TO CREATE AND WORK WITH YOUR PITCH DOCUMENTS.

To pull content into the document, you simply click a button on the PitchPerfect Word or PowerPoint ribbon for the content you wish to search for (e.g. short bio).

This presents the PitchPerfect search form, from which you select the individual lawyers or attorneys you want to insert, and then the relevant content is inserted into your document in the layout and format that your brand and house style demands.

Content MUST be stored in SharePoint. We can integrate to other external CMSs but we can only pull content into Word and PPT from SharePoint. The platform is scalable, flexible, fast, easy to set up, and is built with the relevant features required for content management such as PitchPerfect.

What about the range of content that the PitchPerfect software will need to be able to include?

It is important to know how everything can be included in PitchPerfect and how your bid and BD teams will then be able to update them once the software has been rolled out. This is where the PitchPerfect SharePoint Content Management System comes into play. Different types of content are

held in different SharePoint lists. You can have separate lists for: pitch bank, tender precedent bank fragments; track records, bios, directory quotes etc.

Within each list are several fields. The Enable team breaks down content into separate fields/fragments so that the same content can be used in multiple different ways, and to categorize data for searching purposes. Each list is set up with the customized fields that you want to include for each type of content. This also improves the consistency of data content.

Once the lists and fields have been set up, content can then be included. There are various ways to manage PitchPerfect content. The most common approach is to amend the content directly in SharePoint where a simple form is available specifically for this purpose.

Enable has also built a PitchPerfect Data Import Module (DIM) for SharePoint which can be used to import content quickly and directly from Excel spreadsheets and files such as photos and images. For some clients Enable has synchronized content which resides in other databases or content repositories (e.g. websites).

Key features and benefits include:

1. It works within the familiar environments of Microsoft Word, PowerPoint and Excel
2. As an optional extra: an easy to use self-service (for lawyers/attorneys) content approval system
3. The PitchPerfect Administrator enables you to manage your ribbon and search forms without having to rollout a new application or pay the vendor (i.e. Enable) to make these changes
4. The PitchPerfect ribbon is flexible so that it can include native Word and PowerPoint features, PitchPerfect content insertion, and other PitchPerfect functions which can include bespoke functions from the organisation concerned
5. The ribbon is contextual: the function buttons can appear depending on which template is being used, i.e. Pitch, Short or Long CV/Bio, Team sheet. The function buttons can also be restricted depending on which users are accessing the systems and their access rights

PitchPerfect Unique Features: for Microsoft Word and PowerPoint

Enable's experience and skills with Microsoft Word make your templates not only easy to populate with content, but maximise efficiencies around your unique brand layout and house style

You can focus on making use of the key features available in Microsoft Office and SharePoint rather than building and developing features which already exist in Word and SharePoint, which often happens with home grown developments

You can modify the ribbon and the PitchPerfect search forms using the PitchPerfect Administrator: no developer skills are needed

You can easily populate complex layouts such as experience based tombstones and have the ability to generate dynamic content using Enable SmartFills

You can insert infographics directly from within Word and PowerPoint

RFI functionality allows PitchPerfect content to be inserted into any Word document or Excel spreadsheet where you must use the client's form (template) rather than your proprietary templates

Batch generation of content elements. For example, Enable can generate a complete set of bios for all users in the system in a few minutes within your brand guidelines

The Enable PitchTracker module allows you to profile and capture information about your pitches directly from within Microsoft Word for searching, tracking and reporting

PitchPerfect for PowerPoint gives you the ability to reuse and create new PowerPoint slide deck using PitchPerfect content

Enable has developed a unique Table of Contents (TOC) for PowerPoint

You can reuse information stored in the PitchPerfect CMS for other purposes such as award or directory submissions

You can build functions to bridge the gap between native Microsoft Word, design and layout requirements. For example, your contents page layout is not one that Microsoft Word can produce with automated page numbering. Enable can deliver a feature to update your table of contents and produce this in your unique required format



'One version of the truth'

CHARLES RUSSELL SPEECHLYS IS HEADQUARTERED IN LONDON WITH OFFICES IN THE UK, EUROPE AND THE MIDDLE EAST. CATHY TAYLOR IS A BUSINESS DEVELOPMENT MANAGER IN THE FIRM'S MARKETING TEAM.

A problem which Charles Russell Speechlys had been struggling with for many years was the efficient, consistent and accurate production of on-brand marketing documents. The large and growing firm needed a tool that could assist users in generating a range of marketing documents. This needed to be easy to use and intuitive, incorporated into existing software that the users were familiar with, retain brand formatting, and allow content to be easily stored and inserted into the documents.

PitchPerfect, developed by Enable, was identified as being the most appropriate and effective solution.

Over a 12-month period, Charles Russell Speechlys worked with Enable to tailor every aspect of the tool to create a bespoke solution. "We worked very closely with Enable who were supportive and on-call, as and when we needed them - pretty much daily," says Taylor.

Intuitive & flexible

Taylor recognizes that people adapt to new systems at different speeds: "Some adapt better than others, but PitchPerfect is very intuitive, so anyone who is remotely comfortable and

competent in Word will pick it up quickly."

As part of their firm wide training, Charles Russell Speechlys introduced a step-by-step training manual and ran face-to-face training sessions. The training was compulsory for secretaries and optional for fee earners. "We've had a lot of fee earners, including partners, attend and they have been very impressed at how user-friendly PitchPerfect is and have been quite keen to get engaged with it," says Taylor.

The overall feedback has been excellent, according to Taylor. "Everyone benefits differently, secretaries appreciate being able to create CVs and team sheets themselves, and the lawyers appreciate being able to quickly and easily search for, and use, relevant past experience."

A partner comments, "It looks so simple, but it really is very effective." And that is the beauty of the product. It uses existing systems and skills to seamlessly produce high quality, accurate and consistent documents.



PitchPerfect provides us with three main benefits: the ability to create pitches and tenders efficiently, saving around 90% of the time it used to take to develop similar documents before, accurately using the latest and most up-to-date data and ensuring just 'one version of the truth'

Very quick and very efficient

So how is PitchPerfect for speed and efficiency? "Very quick and very efficient," says Taylor. "The amount of time it saves us putting together tenders and credentials is huge."

The firm's marketing team produces up to ten credentials a week - what they call a general introduction document - and formal tenders, running at least five a month, in response to requests.

Quality output

Taylor summarises the benefits: "PitchPerfect has helped us to create better documents (in terms of both design and content) in a lot less time. And the time-saving element means we can spend more time on the strategic and messaging elements."

Daryl Atkinson, Marketing Director, adds his own perspective: "PitchPerfect provides us with three main benefits: the ability to create pitches and tenders efficiently, saving around 90% of the time it used to take to develop similar documents before, accurately using the latest and most up-to-date data and ensuring just 'one version of the truth', and consistently to our agreed brand and layout."



"Using PitchPerfect has transformed our approach to developing these documents, enabling us to get to a first draft in a fraction of the time it used to which allows us more

time to concentrate on developing our messages and USP for that particular opportunity."

charlesrussellspeechlys.com

enableplc.com/pitchperfect



Lawyers are increasingly 'brand aware'

GILBERT + TOBIN IS A CORPORATE LAW FIRM HEADQUARTERED IN SYDNEY, AUSTRALIA, WITH OFFICES IN MELBOURNE AND PERTH. IT HAS MORE THAN 350 PRACTISING PROFESSIONALS. SARAH-JANE DAVIES IS THE FIRM'S IT PROGRAMME MANAGER FOR LEGAL TRANSFORMATION.

The process of developing tenders at Gilbert + Tobin (G +T) has traditionally been resource and time intensive, we always produced very beautiful well thought out tenders, but a significant percentage of documents were going through our design team and multiple stakeholders for approval," says Sarah-Jane Davies. As a result, G+T wanted to address some of the key 'pain points' and streamline this process, delivering efficiencies in line with the firm's commitment to continuous improvement.

"We identified that while it would take resources to set up, PitchPerfect would deliver significant time savings for us, while ensuring consistency of brand, messaging and tone of voice. We could see a clear application for it in the tender development process area."

Time saving

Since its introduction, Davies says, PitchPerfect has delivered considerable value. By choosing a Cloud-based version, "it gives us immediate access to content, to change or update it. We like that you have the template content within SharePoint, but once it's in a Word document, you can amend it for a particular client."

In operation, Davies says that PitchPerfect "gives us that immediacy to update content such as awards



We identified that while it would take resources to set up, PitchPerfect would deliver significant time savings for us, while ensuring consistency of brand, messaging and tone of voice"



and deals. We are now using up to date information at the touch of our fingertips. The BDMs love it. Being Word-based is a benefit as it requires only minimal additional training, and reduces the need for designers using InDesign."

In terms of images, the integration with a cloud based digital asset management system (Brandfolder) enables PitchPerfect to filter and return only permitted images for use. "Images automatically resize as they come into the document, which delivers huge time savings. That's probably one of the key benefits: not having our design team working on every tender."

Easy to use

Lawyers are becoming increasingly "brand aware," says Davies. "How you

present something can automatically influence whether somebody thinks it's good or bad. It's definitely going to evolve with us. If you take the whole process from start to finish, it will hopefully save us up to 50% in time, enabling us to respond faster to tender opportunities."

Exceeds expectations

"It should allow us to complete 60-70% of tender documents by dropping in standard approved text and then having a quick review to tailor the text to specific client requirements."

Davies is very pleased by what PitchPerfect has delivered. "It exceeds our expectations," she says. In particular she likes "the continual development being undertaken at Enable: they don't see this as a static

product, it's very much a product that they are looking to improve all the time. We're really confident in their technical abilities and account management. That's really key. We're on difficult time zones and the poor guys have been on regular 7am calls with us.

"We're really confident that if we do come across something that it will be looked at and resolved very quickly, which is also very important. The Enable team is very open to feedback and are engaging with us regarding the development pipeline of the product. I would have no hesitation in recommending PitchPerfect to other organisations."

gtlaw.com.au

enableplc.com/pitchperfect

About Enable

Enable Business Solutions was founded in 2013 by Liam Flanagan with his colleague Colin Fowle. He has more than 30 years at the forefront of delivering software solutions to law firms. In 1994, Liam co-founded Tikit, which was floated on the London Stock Exchange in 2001 with a value of c.£11m (\$14m). After reaching a market cap of £50m (\$63m) in 2012/13, Tikit became part of British Telecom.

Based in the heart of legal London, the Enable team combines a wealth of young talent and key individuals strategically drawn from a range of preeminent law firms: experts with decades of experience in providing IT to the Professional Services industry.

The company goal is to design and create software which has intuitive ease of use, always with the ultimate end user in mind. Forward thinking, agile and innovative, they continuously strive to provide the best user experience in their solutions to drive efficiency through simple, smart, accurate and easy-to-use software and services.

Their passion is to allow complex documents to look fantastic in MS Word and PowerPoint while making it easy for every user to work with those documents. Enable is 100% committed to client satisfaction: this ethos is ingrained throughout their business.

They provide software solutions for a range of international law firms across four continents, including several from the UK top 100, three from the Am Law 50, two of Australia's largest firms and the world's second biggest offshore law firm from the Cayman Islands. They are currently in discussions with a number of large firms relating to the future provision of Enable products.

After significant user research among business development professionals, the Enable team has developed a new breed of products and services. PitchPerfect is their flagship enterprise software application, designed to improve efficiency in time and ease of use in creating and managing complex pitch and proposal documents.



Perfect

As well as our suite of applications, Enable offer services in Microsoft Office template creation, consultancy, project management, implementation, and software development

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