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Pitch & Proposal Best Practices: How to Optimize Your Process

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Marketing Technology
Peer Group

Panelists

Marie Alvarez, National Marketing Communications Manager

- Loeb and Loeb LLP — 300+ attorneys / 4 offices
- Hubbard One Proposal Generator that integrates with website.

Cheryl Disch, Proposal Content and Research Manager

- Duane Morris LLP — 700+ attorneys / 24 offices
- Pragmatech Proposal Automation Suite (not integrated with website).

Alexandra Sevilla, Senior Business Development Manager

- Blank Rome LLP — 500+ attorneys / 9 offices
- Blank Rome Government Relations LLC — 20+ lobbyists / 3 offices
- Customized CMS that integrates with website.

Pitch/Proposal Process

- Pitch request / RFP comes in
- Qualify
- Develop
- Maintenance
- Closing

Step 1: Pitch Request/RFP Comes In

Benefits

- Improved collaboration
- Defined intake process

Challenges

- Early Notification
- Volume

Best Practice

Have a defined and consistent process with clear roles and responsibilities among the Business Development Team, Marketing Team and attorneys.

Step 2: Qualify

Benefits

- Focus
- Discover competitive advantages / disadvantages

Challenges

- Not all opportunities are created equal
- Coordination
- Insight to reason for RFP or competition

Best Practice

Having a consistent evaluation process saves time, resources, and prevents doing a lot of work where potential conflicts or low probability of success exist.

Step 3: Develop

Benefits

- Authoritative source of information
- Quick assembly of strawman
- Version control

Challenges

- Keyword coding inconsistencies
- RFPs are getting more specific
- Online submission or Excel formats

Best Practice

Use consistent and defined naming and key word tagging conventions to reduce effort in assembling boilerplate and focus on customizations.

Step 4: Maintenance

Benefits

- Access to the latest and greatest
- Makes future proposals easier
- Set “expiration dates” to regularly update content

Challenges

- Time
- Evaluating new content

Best Practice

Schedule periodic (quarterly/semi-annually) review of content and make necessary updates to statistics, rankings, and capabilities statements.

Step 5: Closing

Benefits

- Sharing
- Tracking outcomes
- Generate year-end statistics

Challenges

- Integration with other technology
- Status updates and connecting “wins” to new matters
- Debriefs with attorney or client

Best Practice

Track all new business opportunities to report ROI to leadership to support the value added by Marketing and Business Development Teams.

Summary of Best Practices

- Define a consistent intake and management process.
- Evaluate all new pitch and proposal requests and focus on those that have the highest probability for success.
- Use a defined and consistent system for cataloging boilerplate content.
- Review and update content on regularly scheduled basis.
- Track the outcomes of all new business opportunities and report to leadership on ROI.

Thank You

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