

# EXPERIENCE MANAGEMENT

*Roadmap to experience management*



# MEET OUR PANEL

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# WHAT IS EXPERIENCE MANAGEMENT?

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*\* The process by which a firm collects, stores, manages, searches, and reports on matters and transactions.*

+ Information collection

+ Reporting

+ Proposal Automation

+ Search

+ Data mining & cleanup

+ Website

+ RFQ, RFP

+ .....



# TECHNOLOGY

is one part of the process



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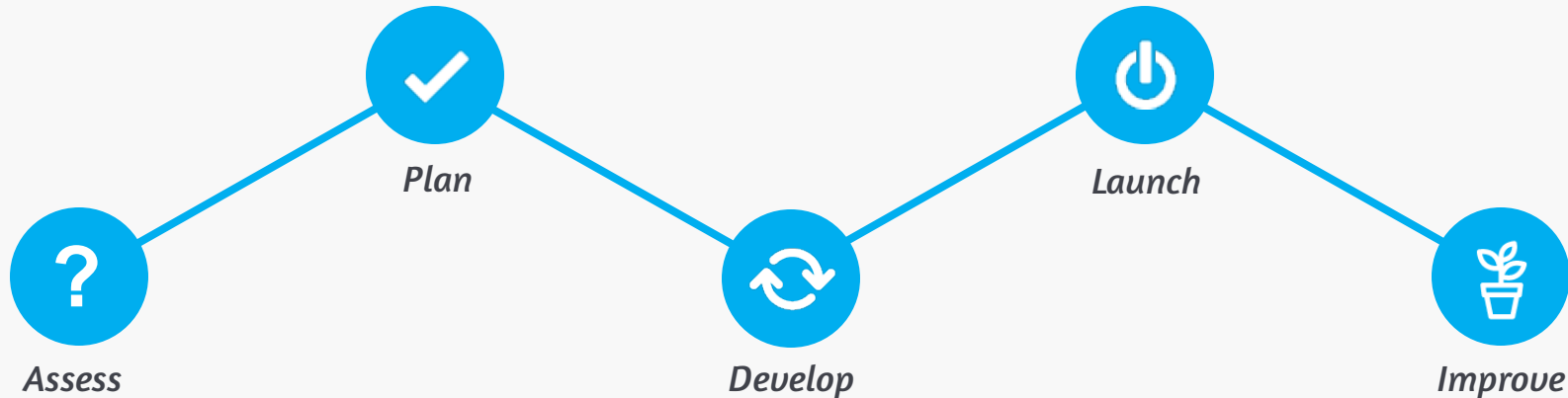
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# PROCESS OF CREATING AN EXPERIENCE MANAGEMENT SYSTEM

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# ASSESS BUSINESS NEEDS

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01

## What problems does it need to solve?

Who has done what? Pitches and proposals? Website? Reporting?

02

## Who will use the system?

Marketing? Business Development?  
Attorneys? Everyone?

03

## Who will manage the project?

Who will manage the project from start to finish? Who will support it?

04

## How do you sell it to management?

How will it help the firm?



# PLANNING

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01

## Who will build it?

Homegrown? Outside vendor? Both?

02

## How will it work?

What will it do? What will reports look like? How will data be used in its final form?

03

## How will staff support it?

Need additional staff? A data steward? Who will support it from IT?

04

## How will we use what we already have?

Where do you have the information now? What format? How will you deal with this data?



# DEVELOPMENT

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01

## Review of Early Development

Get an early look at development to make sure you are on track.

02

## Continual Review

Work out the details, make choices, manage budget. Who does this?

03

## Keep the Ball Rolling

Continually meet with stakeholders to show progress and maintain a level of excitement.

04

## Pre-launch readiness

How do we define success after roll-out?  
Type of feedback? Number of users?





# LAUNCH

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01

## Roll out to marketing/bus dev team

Control the conversation. Test and solicit feedback.

02

## Roll out to first user group

Select a limited number of people to use the system first. Beta testing.

03

## Production Launch

Roll out to the entire user group.

04

## Promote!

Brochures, demos, training, road shows and retreats.



# PROMOTE

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## Marketing

\*Is this a significant matter for marketing purposes?

Yes  No  ?

Flagging a matter as significant will trigger periodic follow-up from the Client Development/Marketing team for information regarding the case status and outcome. This information may be used in future marketing pitches with your permission

# PROMOTE

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*Firmwide Practice Groups: ELUNR, REC*

*Initiatives: Oil, Gas, Pipelines & Mining; Timberlands & Forest Products; Green Building*

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# IMPROVEMENTS – AFTER LAUNCH

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01

## Solicit Feedback

You can't plan for everything in advance.  
Find out what is missing.

02

## Continue Communication

Talk about the value. Share success stories. Continue promotion.

03

## Improvements

Roll out improvements that have been guided by feedback.

