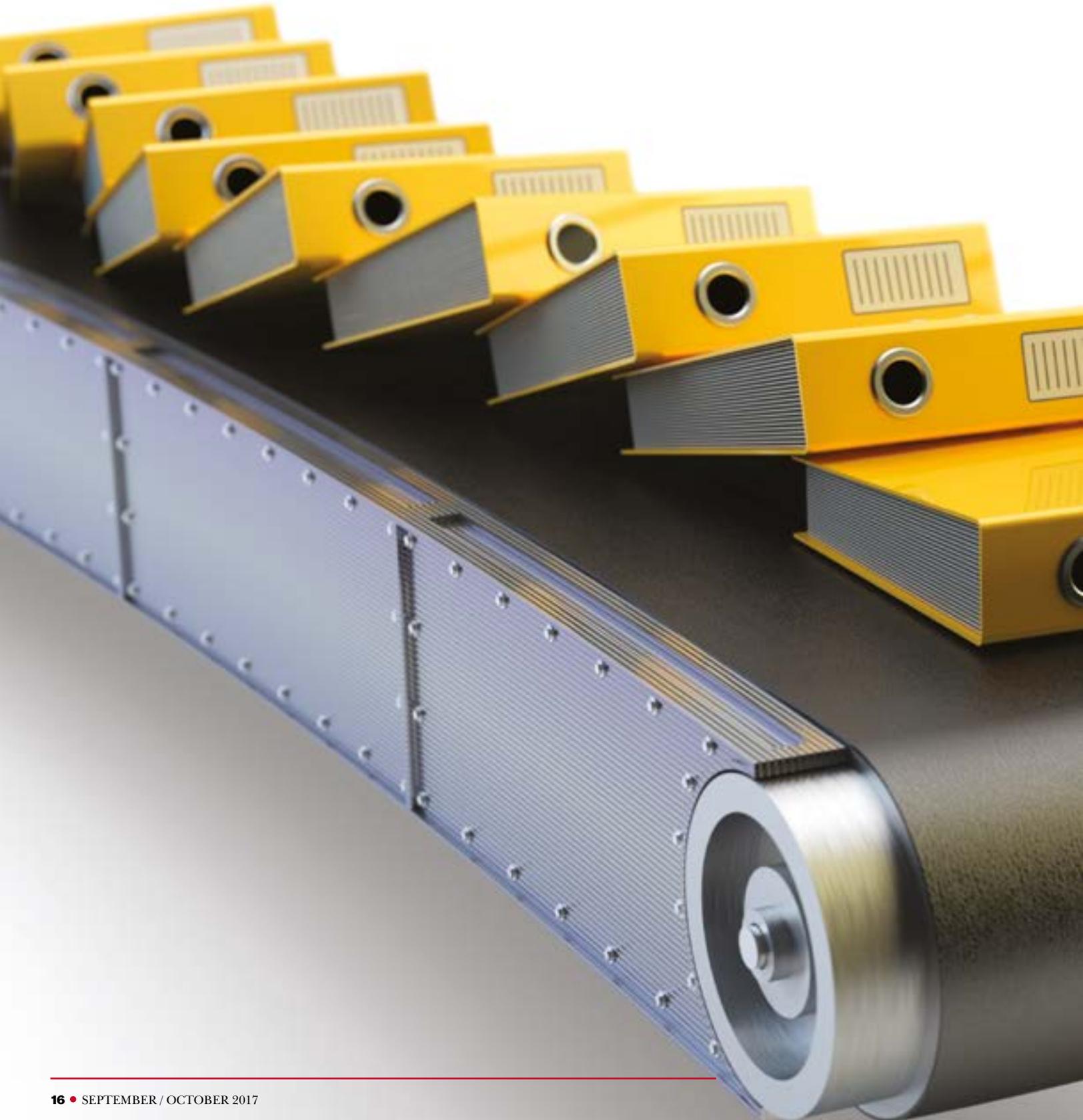


Efficient pitching

Software can help automate and standardise the production of pitch documents. Richard Parnham explores the benefits of this type of solution, and explains the deployment process.





One way that marketing functions can improve their productivity is by deploying pitch software.



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In recent years, many professional service firms have made a concerted effort to deliver more “bang” for their “buck” in relation to their marketing efforts – including the use of performance-enhancing technology.

One way that marketing functions can improve their productivity is by deploying pitch software. Essentially, this software allows users to create and manage pitch documents using straightforward, automated processes. The productivity enhancement offered by this type of solution can be dramatic – the first draft of a pitch can be created in minutes, rather than hours or days. “I’d say that a time reduction of up to 90 per cent is not unrealistic, which has made a huge difference to us,” says Simon Moffat, head of business development at Charles Russell Speechlys. Simon’s firm uses the PitchPerfect software offered by Enable, after inheriting the solution from its legacy merger partner, Speechly Bircham.

Pitch software advantages

For most pitch software end users, the solution itself is invisible. Rather than operating as a standalone product, it is instead embedded within standard Microsoft Office applications, such as Word, PowerPoint and Excel. The solution’s main functionality is accessed via a customised Office ribbon. This means that

anyone who can use Office – be they BD, bid support, fee earners, or secretaries – can also use pitch software, often with only minimal training. “We have supercharged Office for non-design people,” says Rod Lambert, CEO of Mediasterling.

A tender document created by pitch software will be automatically laid out on page, formatted and pre-populated with core pitch information, such as team biographies and pre-approved marketing text. Even the document’s contents page can be assembled without human intervention. However, software vendors do not claim their solution will result in a pitch document that is ready to be signed off without any further work. Rather, as Iphelion managing director Andy Driskell explains, the main aim of the software is “to reduce the time spent getting a pitch document to the point where your experts can focus on the critical content.”

Because pitch software automates many of the time-consuming administrative tasks associated with tender production, most vendors will argue that the efficiency savings yielded by the solution can help justify the cost of its installation. “If your firm currently produces around 100 - 150 tender documents per year, deploying a pitch solution would easily allow you to produce another 20 with the same level of resources. Even if your firm only wins 10 of these additional tenders, the business case for a software deployment is relatively straightforward,” says Jonathan Keighley, director of business development for Qorus’ UK and European operations. “Equally, you could use the time saved to add further value to your documents.”

The promise of a more efficient pitch production process is one of the most commonly-cited reasons offered by vendors for deploying a software-based solution. However, it is not the only benefit of doing so. Another advantage of pitch automation is that it enables a firm’s tenders to have a consistent look and feel, no matter who produces them or where the document is created: the era of “designed and on-brand tender documents in London, completely different looking documents in Lisbon” is very much a thing of the past. “This makes brand managers very happy,” comments Enable’s client services consultant, Cathy Taylor.





During a typical software installation, input from numerous internal stakeholders will be required, at different stages of the deployment process. For example, the firm's brand manager and design team will often play an important role in the early phase of the project, helping to devise the look and feel of the firm's templates.

➤ Pitch software does not entirely abolish design creativity during the tender production process. Indeed, some solutions allow authorised “super users” to be granted a greater level of layout flexibility, when compared with standard users. For example, super users can be given permission to exchange one pre-approved pitch cover image for another, or to display the firm's credentials using tombstones rather than in list form. What even these advanced users cannot do, however, is generate tender documents that require expensive support to produce, such as professional printers. “Often, we are initially presented with pitch document designs that don't play to Office's strengths, because it's not what the firm's designers are used to,” says Mediasterling's Rod Lambert. “It's part of our role to help produce templates that deliver the spirit of what the firm's designers want, but can use Office to achieve it.”

accessible raises its own challenges, in terms of the firm maintaining oversight of what matters individual fee earners choose to bid for. For this reason, some pitch vendors include workflow monitoring within their solutions. This technology can be used to alert the firm's marketing team whenever a new pitch document is created – which may prompt a “is there anything I can help you with?” conversation. Further down the line, some vendors' workflow management tools allow marketing personnel to monitor the progress of pitches, both individually and on a firm-wide basis. This latter type of monitoring can be used to evaluate a firm's tender success rate.

In terms of the timeframe taken to deploy a pitch solution, vendors report that the process can take anything from a few weeks to up to 12 months. Internally within the firm, one key variable will be whether the solution is being rolled out in conjunction with another marketing project, such as a rebrand or marketing team restructuring. Other firm-specific issues that can influence the rollout timeframe include the need for multilingual capabilities, the level of integration required with the practice's other IT systems, and whether the firm currently meets most vendors' minimum IT requirements – typically Microsoft Office 2010, plus SharePoint.

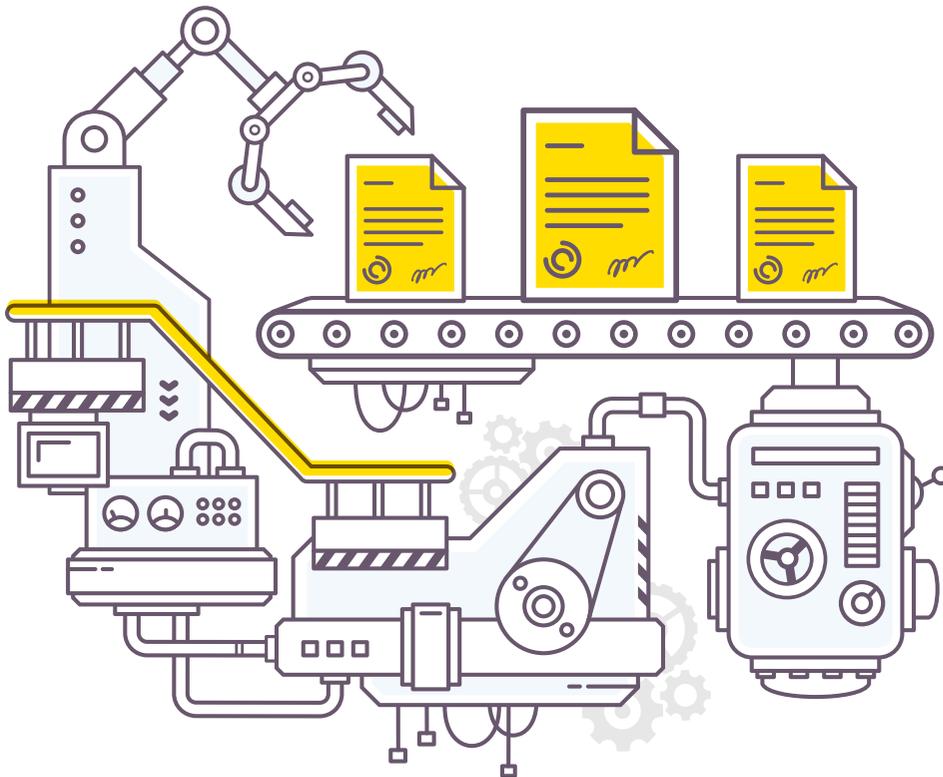
Organising content

Of all factors that can influence the timeframe of a successful pitch software deployment, arguably the most significant will be the firm's approach to producing, storing and managing its marketing content. Is this content currently captured, classified and maintained in a structured format – the ideal approach? Or is the management of the content currently, in the words of Qorus' Jonathan Keighley, “a mess”? Helpfully, while vendors are always delighted to discover the former, they are also realistic about the likelihood of encountering the latter. “Our advice is that marketers should treat the installation of pitch software as a means for getting their act together, in terms of how they manage their marketing content,” Jonathan advises. “It won't be easy – but it'll be worth it in the end. When you only have one group of approved marketing materials, you can manage them all centrally.” Enable's Cathy Taylor agrees: “This process involves short-term pain for a long-term gain,” she says.

Helpfully, some marketing data that forms a key element of a typical pitch document will already have been captured, classified and standardised – for example, the fee earner biographies that appear on a firm's website. Here, the main task will be to integrate the pitch software with the content management system (CMS) that underpins a firm's website biographies. Once this task is performed, these biographies can then be automatically inserted

Besides standardising a tender document's look and feel, pitch software can also help enforce the standardisation of the marketing text that will be included in it – the text available for insertion is typically limited to pre-approved sources. This functionality ensures that “only one version of the truth” can appear in a firm's tender documents. Indeed, some pitch solutions monitor the age of the marketing content that is used in its tenders, and can alert relevant personnel if the information has not been recently updated.

Of course, making the production of pitch documents straightforward and



into the pitch document as required.

However, some software vendors offer solutions that go beyond simply inserting standard marketing text, or fee earner biographies, into their pitch templates. Instead, these vendors also offer a fully-fledged “matter library”, which can be interrogated – in real time – for examples of past projects that may boost a tender’s credentials. Assuming that a past matter synopsis is classified as being in the public domain, this information can then be inserted directly into a draft pitch document.

Of course, in order for a firm’s matter library to achieve its full potential, it must first be populated – often, a significant undertaking for any marketing function. Here, vendors such as Iphelion have attempted to make this process as painless as possible, by enabling their software to extract historical matter data from a firm’s practice management system (PMS). This historical data can form the bare bones of a firm’s matter library, which the marketing team can then “backfill” marketing literature around. Even team members of past projects can be uncovered using this approach: “If your PMS shows that a fee earner spent more than ten hours on any given matter, then it’s probably fair to say that they were part of the project team,” Iphelion’s Andy Driskell explains.

Managing the deployment process

However simple – or complex – the pitch software’s functionality, most vendors recommend that any firm deploying this type of solution should appoint an internal project manager to oversee the process. The project manager can then liaise between the firm’s many internal stakeholders, and also externally with the solutions provider.

During a typical software installation, input from numerous internal stakeholders will be required, at different stages of the deployment process. For example, the firm’s brand manager and design team will often play an important role in the early phase of the project, helping to devise the look and feel of the firm’s templates. Later on, the firm’s IT and pitch team will typically come to the fore: IT in relation to software installation and systems integration, pitch advisors in relation to content collation, classification and standardisation. Towards the end of the process, the firm’s internal communications team may also be required, tasked with helping to promote the solution’s take-up on a firm-wide basis. At all stages of the rollout process, vendors recommend that the firm’s leadership team should visibly and repeatedly endorse the solution’s deployment, in order to reiterate its strategic importance.

In terms of training required to ensure a successful pitch solutions deployment, these are likely to be both firm and solution specific. Some practices may prefer to roll out the solution on a firm-wide basis – in which case, modest training will be needed by all practice personnel. Other firms may opt for a more limited deployment – for example, within the BD function only. Each group of users will also have distinctive training requirements. Standard users – who will only use the application’s Microsoft Office-based “front end” – will typically be able to learn how to operate the software after a short training session, lasting between one and two hours. By contrast, super users, who maintain and update the system’s “back end” features, are likely to need more advanced training. But, even here, training requirements are likely to be a matter of few days, and not weeks. Even for those pitch solutions that have extensive back-end functionality, their

systems are designed to be used on a “drag and drop” basis: no coding experience or IT support will typically be required.

Final thoughts

To date, pitch software has been adopted by a diverse range of professional service firms. These range from mid-sized regional UK law firms such as Birketts, to global multidisciplinary leviathans such as EY. There is, therefore, no typical “type” of firm that installs a pitch software solution. Arguably what unites pitch software enthusiasts is not their size, industry sector or geographical profile. Rather, these firms share a desire to improve the efficiency, consistency and quality of their pitch production process.

In reality, a successful pitch software deployment will typically include a degree of upfront pain – particularly in relation to the collection, classification and standardisation of a practice’s marketing literature. However, the end results will almost certainly be worth it. Across the entire firm, pitch software offers the prospect of dramatically reduced timescales for producing tender documents. Just as importantly, following a successful deployment, marketers can often be released much of the administrative drudge work that typically accompanies the pitch production process. Rather than spending time formatting text or hunting for fee earner biographies, marketers can instead spend their time adding value to the tender’s substance: they can become trusted pitch advisors rather than document assemblers.

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Vendor overview

A small group of vendors supply pitch software to the professional services market. Each has their own unique offering and client profile, and each also offers a range of associated solutions. Below is a non-exhaustive list of pitch solution vendors, displayed in alphabetical order.

Vendor: Enable
Founded: 2013
Office location: London
Pitch software name: PitchPerfect
Indicative professional service clients: Ashfords, Baker Botts, Birketts, Charles Russell Speechlys, Gilbert + Tobin, Lewis Silkin, TLT
Selected other solutions offered by company: ContentManager, LegalPerfect, DocumentPerfect

Vendor: Iphelion
Founded: 2006
Office location: London UK
Pitch software name: PitchPoint
Indicative professional service clients: CMS Cameron McKenna Nabarro Olswang, Clyde & Co, Farrer & Co, Kennedys, Milbank, Stephenson Harwood
Selected other solutions offered by company: Outline, Signature Creator

Vendor: Mediasterling
Founded: 1998
Office location: London
Pitch software name: Forward Pitch
Indicative professional service clients: Aon, Grant Thornton, JLT, Norton Rose Fulbright, Watson Farley & Williams
Selected other solutions offered by company: Report Author, Template Manager, Power Pack for PowerPoint

Vendor: Qorus
Founded: 2008
Office locations: Bellevue and New York US, London UK, Cape Town South Africa
Pitch software name: Breeze
Indicative professional service clients: Hogan Lovells, Ashurst, EY, Keoghs, Kramer Levin, Seyfarth Shaw, Greenberg Traurig
Selected other solutions offered by company: Qorus for Office 365 – DocBuilder for SharePoint Online, DocGeneration