



How Blank Rome uses Foundation to win more business and enable their lawyers to exceed client expectations

BLANKROME

A NEED FOR EXPERIENCE MANAGEMENT

Blank Rome understands the advantages of being nimble and offering customized delivery of services in a quicklychanging world. A key ingredient in this recipe for success is data — the ability to consolidate, understand, and operationalize it for both the business and the practice of law.

Building out an experience management solution at the firm was one pillar in achieving this goal. According to Brad Miller, Director of Technology Innovation and Information Services at Blank Rome, the firm had spent a lot of time and effort exploring a number of different experience management solutions before selecting Foundation.

“Having had a couple of false starts, we really put Foundation through its paces to ensure it could accomplish what we needed,” explained Miller. “We quickly learned that we could do what we wanted in Foundation, plus extend the platform for other needs within the firm.”

PRIMARY USES

- Biography Management
- Boilerplate Content Management
- Client Dashboards
- Diversity Tracking
- Experience Management
- Firm Directory
- Lateral Integration
- Matter & Lawyer Profiling
- Pitch & Matter Staffing
- Proposal Generation & Reporting
- Rankings and Awards Submissions

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Brad Miller

Director of Technology Innovation and Information Services, Blank Rome



KEY INTEGRATIONS

- LexisNexis®
- Microsoft Office
- InterAction
- Thomson Reuters Elite
- Power BI
- Website
- Workday

What is the percentage of historically underrepresented lawyers on a pitch?

What is the percentage on resulting matters?

Are we meeting our clients' requirements for diverse staffing?

THE STRENGTH OF A DATA PLATFORM

Blank Rome launched Foundation with their initial experience management use case, as Miller explained it, to “find what we needed when we needed it.” The implementation involved passively collecting data from Elite 3E and importing historical data, and the integrations and internal firm applications steadily grew from there.

Miller keeps his finger on the pulse of emerging needs within the firm. Rather than reinventing the wheel, he offers Foundation and its source of rich, consolidated data as a solution where the platform can be further leveraged.

The following are just a few examples of how Foundation is helping Blank Rome to compete with data more effectively.

DIVERSITY AND INCLUSION ANALYTICS

Blank Rome is proud of its 75-year mission and commitment to fostering an environment of diversity and inclusion. Firm leadership surmised that the firm saw more success when diverse teams were pitched and matters were diversely staffed. However, incomplete data and siloed systems made this hypothesis difficult to prove.

Blank Rome is now positioned to use Foundation to tackle this challenge, as well as to document progress for the Mansfield Rule. The firm had already made the decision to move their pitch process to Foundation, including assembly and generation, and the next step was to integrate lawyer diversity information from their HR system.

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Brad Miller
Director of Technology Innovation and Information Services, Blank Rome

As Miller explains, “Having all this information in Foundation helps provide deep insights into our diversity progress. It’s easy to produce reports that analyze the mix of historically underrepresented individuals within our pitches, as well as show how the mix relates to our win/loss rates. Ultimately, we think it will help Blank Rome win more business.”



As an increasing number of clients ask about the diversity makeup of the teams actually working on their matters, Foundation is there to help. Blank Rome plans to use the system's built-in calculated fields to display diversity percentages front and center on client profiles.

"It keeps diversity top of mind for our lawyers and the information is automatically updated and easily accessed to keep clients informed," concludes Miller.

LAWYERS LEVERAGING DATA

While Blank Rome's marketing and business development team has spent the most time in Foundation, the firm's lawyers are finding new uses for the wealth of data already being collected and enriched in Foundation.

Miller's ears perked up when the Intellectual Property practice management team expressed interest in a skills and expertise spreadsheet to easily slice and dice information to staff pitch teams. Foundation already had most of the data the team was after, including all the matters the lawyers had worked on, biography narratives, and relevant details from Workday, such as location, bar admissions, education, and more.

Miller was able to easily configure Foundation to track the remaining new fields around areas of expertise to meet all of the practice team's needs, then create Foundation reports to provide an intuitive way to filter and search for lawyers with just the right experience to match their criteria.

As other lawyers have seen the new skills and expertise report, usage has grown. The IP group is now using this same

report for staffing, and the corporate litigation and corporate M&A groups have asked for reports of their own. The bonus? There are now more groups invested in caring for the data, which in turn is available across the firm.

Finally, Blank Rome is capturing the DMS document link on their Foundation matter profiles. Legal teams can use Foundation's powerful, granular search to pinpoint a relevant matter, then follow the link to quickly see language that can be of use in new matters.

LOOKING TO THE FUTURE

Blank Rome is just getting started when it comes to leveraging the data in Foundation. Next, they're looking to build out reports for their sales teams to assess the ROI of their efforts.

Miller is also continuing to expand Blank Rome's 360° client view, bringing in additional information from their CRM, as well as third-party sources. According to Miller, adding these integrations to what they already have will give them an even greater understanding of their clients.

FINDING A PARTNER IN FOUNDATION

Miller has only praise for the Foundation team, "Foundation is one of a few service providers that truly puts its customers first. They have an overwhelming willingness to jump in and help us build solutions, solve problems, and figure out unique ways to address our challenges and take advantage of opportunities available within the platform. It's been a wonderful partnership."



LITERA

Foundation

CASE STUDY

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Since partnering with Foundation, Blank Rome has benefited from an efficient, data-driven experience management solution that has advanced their marketing and business development efforts in client pitches, key firmwide initiatives, and more. With new reporting and tools on the horizon, Blank Rome is excited for the creative client solutions that will be realized through Foundation in 2021 and beyond.

Learn more about Foundation at litera.com/products/foundation or scan the QR code to schedule a demo.



Litera has been a global leader in legal technology for 25+ years, helping legal teams work more efficiently, accurately, and competitively. As a leader in document workflow, collaboration, and data management solutions, we empower legal teams with simplified technology for creating and managing all their documents, deals, cases, and data.

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