



# Ikaun Replaces Existing Experience Management to Power Best-in-Class Data Solution for Marketing and BD Teams

## Background: Globally Recognized Firm Leverages Marketing Technology to Level the Field

This globally recognized law firm has offices in the domestic U.S. as well as London and Paris. The firm's senior MarTech team drives a data-driven marketing and business development program on par with larger, global firms, providing the firm's attorneys and Business Development teams with a library of data that is cataloged and seamlessly accessible for a broad set of critical business needs, from winning new business to providing the exceptional client service for which the firm is known.

To that end, experience management is one of the firm's most vital technology systems. Experience management captures matter-specific information about current and prior work and makes other data accessible to the Marketing and Business Development teams, enabling them to respond swiftly to attorney requests for information.

The MarTech team wanted to ensure it was standing up systems for business development that were useful around what work the firm performs, how the firm is positioned when it comes to a pitch or an RFP, and how the marketing team equips the firm with data rich answers to questions that drive revenue and relationships, such as:

- ✓ Have we done case work in this specific area before?
- ✓ What work have we done that best relates to the current issues of the prospect?
- ✓ What stories can we tell that will help us win this new client?
- ✓ What type of work have we provided to companies or individuals in a specific industry?
- ✓ Have we worked within this specific jurisdiction before (as it relates to cross-border work, international arbitrations, etc.)?

## Challenge: Existing Experience Management Not Delivering Data and No Customer Support

Prior to engaging with ikaun, the firm had an experience management solution, but it wasn't delivering the right data: The flow of data from the financial systems was not working correctly, duplicate descriptions were being created, and the team was not able to search the system because the fields were not populated properly, which made the team lose trust in the accuracy of the data. The team therefore was forced to pull experience data manually, which caused a significant time burden.

The MarTech team worked with the prior experience management provider to resolve the issue, but it surfaced another deal-breaker challenge: customer service. When leaders from the firm reached out for assistance, the repeated response was to redirect them to online tutorial videos and to participate in many time-consuming discussions of how to solve the data disconnect.

The firm's Senior MarTech Manager comments: "Our relationship with service providers is built on partnership, yet despite our efforts to address challenges together, we felt our previous provider lacked genuine interest in understanding our business needs. Following discussions with firm leadership, we have decided to explore alternative options in the market for a new experience management solution."

## Objectives for The Firm

“ Experience management plays a crucial role as a marketing resource, empowering us to fulfill partnership requests autonomously.

As our firm grows rapidly, the ability for our Marketing and Business Development teams to swiftly access and leverage precise data becomes indispensable. This capability is pivotal in acquiring new business and driving strategic initiatives across our partners and diverse practice areas.

*Senior Manager, Marketing Technology*

“ Our goal is to implement business development systems that align precisely with our work, firm positioning, and attorney representation in pitches and RFPs. We aim to empower our team with data-rich insights that not only drive revenue but also strengthen client relationships effectively.

*Marketing Technology Systems Analyst*



## Firm Selects ikaun to Form True Partnership and World Class Solution

After an extensive search and recommendations from peer firms, the MarTech team turned to ikaun. One member of the firm comments:

“From the outset, our interaction with ikaun was distinctively refreshing – they were a true partner. They approached us as collaborators in ensuring the success of our experience management system.”

With the ikaun leadership, it was apparent immediately to all members of the firm that they would not only be getting a team of exceptional experts in the technical components of experience management technology, but also a problem-solver who had a deep understanding of the business challenges the firm’s Marketing and Business Development teams were tasked to answer.

The ikaun team worked tirelessly with the firm’s external SQL resource to map fields into the correct homes within ikaun to ensure the financial data was brought over accurately. The ikaun team also mapped some data from the firm’s old experience database to ikaun, which was a big project in and of itself.

The firm’s MarTech analyst comments:

“Our experience with ikaun has been a game-changer. From top-tier leadership to dedicated customer support, they've revolutionized our operations. Our systems are now seamlessly integrated, empowering us to harness our wealth of data effectively for all our business development endeavors.”

Today, ikaun pulls matter information seamlessly from the firm’s financial systems, and:

- ✓ Centralizes everything the firm has worked on and who did it into a single location, giving the firm the ability to respond to client requests for experience faster.
- ✓ Categorizes work based on various data attributes and gives the Business Development team the ability to find experience through keyword searching, sorting, and filtering.
- ✓ Stores attorney profiles that help the team understand who at the firm has expertise and experience across practices, industries, and types of work.
- ✓ Solves the business process headache of attorney biography updates via a nightly feed of biography data from the firm’s content management system.
- ✓ Offers different matter descriptions according to usage.
- ✓ Helps the marketing team with awards and ranking submissions including Chambers.

## Takeaways: ikaun Delivers Best-in-class Data Foundation to Power Firm’s BD Strategy

With ikaun in place, the firm now has the technology to build a best-in-class data foundation to power the firm’s business development strategies—in addition to gaining a trusted partner in the firm’s evolving marketing and business development needs.

“We aimed to establish a solid foundation for our experience systems, and with ikaun, we've achieved that goal. Throughout the process, the ikaun team has been our steadfast partners, guiding us in translating our business processes into effective technology integrations and workflows.

Their solutions have enabled us to operationalize our business development efforts effectively, delivering significant value to our firm and our attorneys. I can't praise their expertise and support enough.

[Our firm] operates as a premier white-glove service provider, approaching every pitch, RFP, and engagement with tailored precision and client-centric strategy. Our reliance on a top-tier experience management solution and trusted partners is paramount—and with ikaun, we've secured both unequivocally.

*Senior Manager, Marketing Technology*