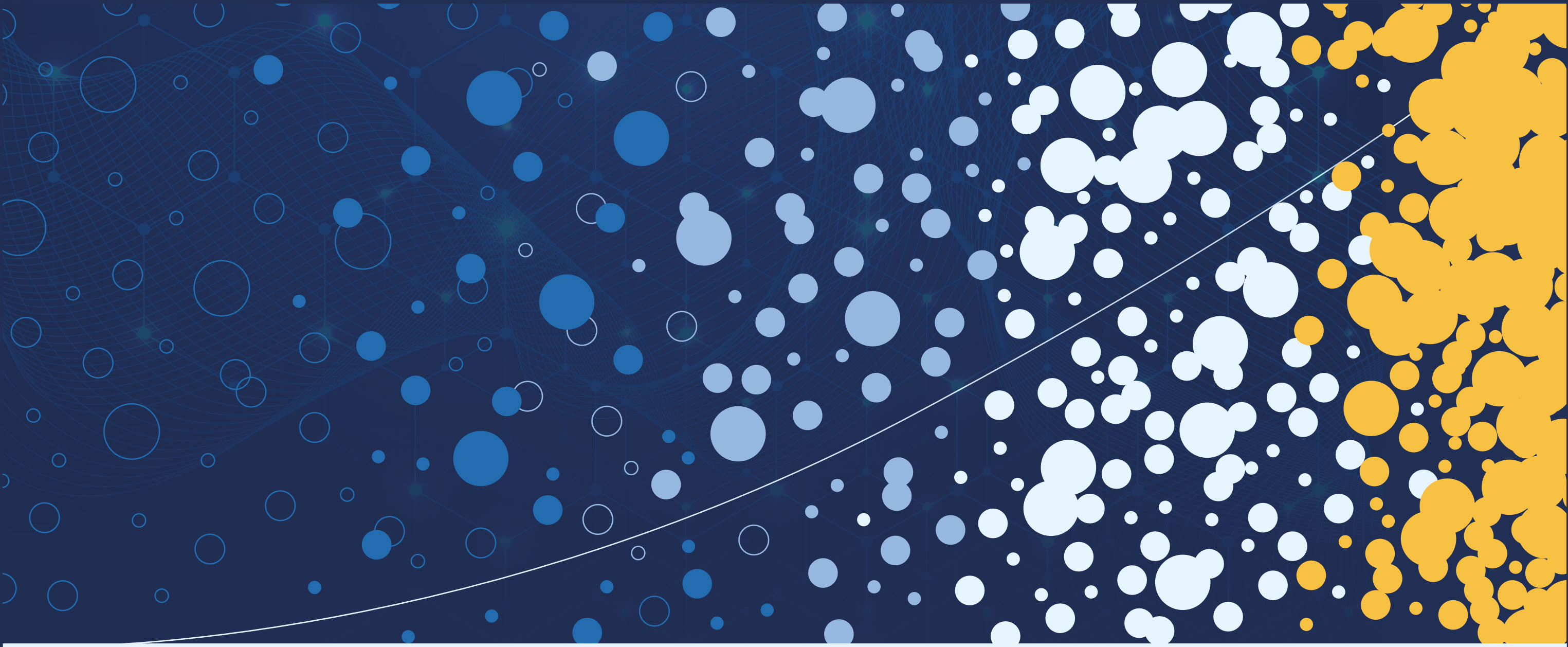


THE LAW FIRM BUSINESS DEVELOPMENT DATA MATURITY MODEL



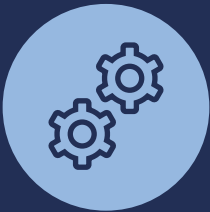
DATA
BLIND



DATA
AWARE



DATA
PROFICIENT



DATA
SAVVY



DATA
DRIVEN



MATURITY MODEL AT A GLANCE

One important outcome of the industry report [Marching Toward Data-Driven Business Development](#) was the recognition that an industry- standard for law firm business development maturity in terms of leveraging data would be very helpful to CMOs and the firms they support.

This maturity model is the result of our research and our collective work with many firms over the years.

DATA INFRASTRUCTURE

BUSINESS READINESS

EXTERNAL DATA USAGE

DATA CULTURE

TEAM DEVELOPMENT

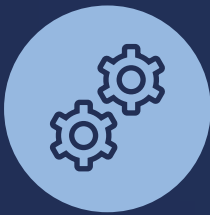
DATA
BLIND



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DATA
SAVVY



DATA
DRIVEN



No Systems
in Place for
Data Collection

Data Strategy
and Technology
Roadmap in Place

Response
Systems with
Manual Processes
in Place

Cloud-Based
Infrastructure and
Essential Process
Automation

Modern Data
Architecture with
Comprehensive
Automation

No Use Case
Awareness

Identified
Use Cases for
Leveraging Data

Processes for
Reacting to
Information
Requests

Proactive
Monitoring for
Critical Use Cases

Proactive Monitoring
for Expanded List
of Use Cases

No Awareness
of External Data
Sources Beyond
Legacy Tools

Basic Understanding
of External Data
Sources

Ability to Use
External Data
in Response
to Requests

Automated or Hybrid
Processes to Speed
Turnaround

Combination of
Internal and External
Data for Proactive
Insights

Data in Silos with
No Visibility or
Sharing

Awareness of
Data Types But
No Active Sharing

Data Policies in
Place with Some
Data Sharing

Centralized Data
with a Collaborative
Data Culture

Data Used as
Strategic Firm Asset
for Growth

No Distinct
BD Function

BD Team Primarily
Reacts to Attorney
Requests

BD Team
Collaborates with
Other Teams

Centralized BD
Function with
Resources and
Support

BD Function
with Firm-Wide
Reach and Client-
Facing Role

DATA INFRASTRUCTURE

DATA BLIND

No systems in place to consistently track client data or collect external data, making the response to each BD-related request ad hoc.

DATA AWARE

Have established a technology roadmap to enable a data strategy that allows for more cohesive responses to incoming BD requests, including RFPs, pitches, and attorney inquiries.

DATA PROFICIENT

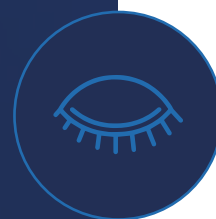
Have the systems in place to respond effectively to incoming BD requests, but data collection processes remain primarily manual.

DATA SAVVY

Have implemented cloud-based infrastructure and sufficient levels of process automation in key data collection areas to execute on a proactive BD strategy for current clients across the entire firm.

DATA DRIVEN

Have instituted modern data architecture with comprehensive automation across all data collection areas and employ insightful analytics to execute on a proactive BD strategy for both current clients and prospects.



MOVING TO DATA AWARE:

- 1) Develop a data strategy and a corresponding technology roadmap
- 2) Seek out educational resources and industry experts for guidance



MOVING TO DATA PROFICIENT:

- 1) Implement firm data strategy and move forward with technology roadmap
- 2) Identify key stakeholders and begin socializing new data infrastructure initiatives



MOVING TO DATA SAVVY:

- 1) Fully implement data strategy firm-wide with systematic data collection and governance
- 2) Win over key stakeholders, move to the cloud, and start leveraging modern tech stack



MOVING TO DATA DRIVEN:

- 1) Implement data lake or data lakehouse architecture, complete API integrations, and develop automated data feeds
- 2) Develop data analytics and intelligence from streamlined architecture and self-service tools for attorneys and clients



BUSINESS READINESS

DATA BLIND

Unaware of the business use cases connected to leveraging external data sources for BD activities.

DATA AWARE

Have identified use cases where external data could streamline the response to inbound BD requests and performed an evaluation of potential roadblocks, processes, and internal stakeholders.

DATA PROFICIENT

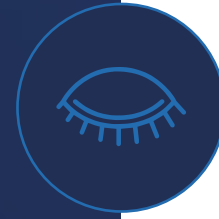
Have processes for using data to manage reactive requests connected to core use cases for BD, such as responding to RFPs and providing data for partner pitches. Have limited buy in from small segments of the firm.

DATA SAVVY

Have expanded business readiness to additional BD use cases connected to proactively monitoring alerts, filings, and trends to secure new business from existing clients. Have full buy in from key practice groups and larger segments of the firm, but lack full firm-wide buy in.

DATA DRIVEN

Proactively gathering data and monitoring for new business opportunities with both existing clients and new potential prospects. Firm leadership, practice groups, and partners see the value and ROI of using data effectively to beat the competition in securing marquee work and have some understanding of what work may be most profitable.



MOVING TO DATA AWARE:

- 1) Identify high-value business use cases that could benefit from leveraging data
- 2) Determine potential roadblocks, processes, and internal stakeholders



MOVING TO DATA PROFICIENT:

- 1) Implement processes for using data to respond to RFPs and requests from partners and practice groups
- 2) Identify and win over internal champions, who can help get quick wins and show potential ROI



MOVING TO DATA SAVVY:

- 1) Move from responsive to proactive use of data to identify business opportunities with existing clients
- 2) Expand buy in to larger segment of the firm and win over key practice groups with recurring data needs



MOVING TO DATA DRIVEN:

- 1) Transition from proactively monitoring existing clients for opportunities to using data to discover and win business from prospective clients
- 2) Achieve firm-wide buy in for leveraging data to win new business and strengthen existing client relationships



EXTERNAL DATA USAGE

DATA BLIND

Unaware of the external data sources that can be leveraged for BD tasks and content. Tools currently limited to traditional research databases such as LexisNexis, Westlaw, or Bloomberg.

DATA AWARE

Understand the external data sources needed for BD, but implementation is hindered by a lack of infrastructure or internal buy in from key stakeholders. Have a roadmap in place to solve for this. If firm applications are supported by external data at all, data is manually gathered and entered into systems as needed and not consistently monitored for business development opportunities.

DATA PROFICIENT

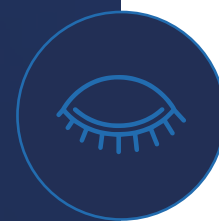
Have a process defined for using external data in responding to inbound BD requests like building pitches and answering RFPs. No process exists for leveraging intelligence derived from this data for future pitches and RFPs or for merging it with internal data for additional insights. No automation has been implemented for gathering external data or combining it with internal data.

DATA SAVVY

Have developed hybrid processes combining some automation with manual capture of external data and can provide complete data sets and speed up turnaround times on inbound requests. Using external data to proactively monitor for opportunities with current clients, but that ability does not yet extend to new clients.

DATA DRIVEN

Able to combine external data with internal data to proactively identify, evaluate, and win new business from existing and prospective clients. The intelligence gathered informs prioritization of opportunities based on predicted profitability and uncovers trends that allow BD teams to focus on growth areas. Able to fulfill data requests from across the firm via fully automated, self-service dashboards that provide real-time insights across industries, case types, and even jurisdictions.



MOVING TO DATA AWARE:

- 1) Identify possible external data sources needed to win new business outside of traditional research tools
- 2) Conduct vendor discovery calls and demos to further identify data products and services aligning with your business needs and budget



MOVING TO DATA PROFICIENT:

- 1) Start actively gathering external data manually from outside sources to be used in BD and marketing
- 2) Implement the basic internal infrastructure and processes to increase efficiency and responsiveness for RFPs and pitches



MOVING TO DATA SAVVY:

- 1) Begin introducing hybrid, automated/manual data collection into workflows to streamline and scale operations
- 2) Proactively use external data sources to identify business opportunities with current clients and respond more quickly to data requests



MOVING TO DATA DRIVEN:

- 1) Proactively weave together external and internal data sources through automated and hybrid processes to proactively identify new business opportunities with existing and new, prospective clients
- 2) Fulfill data requests with automated real-time self-service dashboards and allow data to drive BD and marketing initiatives



DATA CULTURE

DATA BLIND

Partners, practice groups, and support functions do not share data and are not aware of the data that exists or how it could be used in BD. The firm operates in a fully siloed data environment that leads to lost opportunities. No policies are in place to mandate data sharing and there is no buy in for developing policies. Most BD activity revolves around attorney coaching for individual opportunities.

DATA AWARE

There is awareness of data types that partners, practice groups, and support staff are creating, but BD teams do not have access and have not obtained the buy in needed to receive this data. No data sharing policies have been adopted, but efforts are underway to move toward a more collaborative data culture. Static lists have been compiled for BD purposes, but mostly inform attorney coaching, not proactive strategies.

DATA PROFICIENT

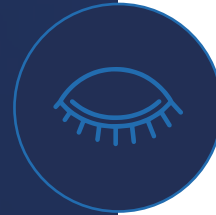
Have begun to implement data governance policies and build willingness amongst attorneys to provide data about their work to aid in BD efforts. There is some buy in with key stakeholders and partners, but no firm-wide adoption of collaborative data culture. Firm applications produce incomplete intelligence due to the inconsistent nature of attorney information capture at key points in the matter lifecycle.

DATA SAVVY

Data governance policies have been fully implemented, and the firm has begun to win new business by creating a collaborative data culture. Data capture at matter opening, during critical points in the matter, and at matter closing is consistent across the firm. The available data feeds into dashboards for a centralized BD function to respond to inbound requests and begin efforts at becoming more proactive.

DATA DRIVEN

Firm leadership has a strategic plan in which data-driven BD efforts play a key role and are tied to performance reviews. Collaboration has developed between practice groups to facilitate cross-selling. Data has come to be viewed as a firm asset, and this mindset creates consistency and accuracy in firm applications and empowers the development of actionable insights for winning new business and better managing client relationships.



MOVING TO DATA AWARE:

- 1) Identify the sources of internal data that exist and which partners, practice groups, and functions are the owners of that data
- 2) Conduct a review of the policies connected to data governance needed and the processes and personnel needed to implement those policies



MOVING TO DATA PROFICIENT:

- 1) Begin implementing firm data policies and begin the process of data collection from key partners, practice groups, and functions
- 2) Identify key stakeholders and champions needed to achieve more systematic data collection firm-wide



MOVING TO DATA SAVVY:

- 1) Fully implement data governance policies and best practices for data sharing at critical junctures during client engagements
- 2) Begin breaking down data silos between partners, practice groups, and functions and achieve core client data sharing



MOVING TO DATA DRIVEN:

- 1) Achieve systematic collection and data sharing between partners, practice groups, and functions to fulfill BD and marketing needs
- 2) Prove the ROI of a collaborative data culture by winning new business and better managing client relationships with insightful analytics and intelligence



TEAM DEVELOPMENT

DATA BLIND

No centralized BD function or data-specific roles exist. Institutional knowledge is the key input for responding to inbound BD requests and there are no succession plans for senior business leaders leaving the firm. BD is seen as a purely relationship-driven activity and any BD roles are built around that philosophy.

DATA AWARE

A team is being built, but still focused primarily on reacting to attorney BD needs. Beginning to hire roles and redesign processes to take future data use beyond basic research to fulfill inbound requests and ensure retention of institutional knowledge. The BD function is not client-facing and still runs on a relationship-based approach.

DATA PROFICIENT

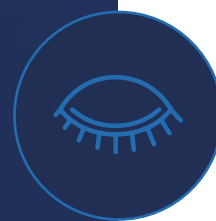
Have built out teams to manage the manual processes required to respond to data requests at scale with speed, often leveraging complementary teams within the firm, such as KM, CI, and IT, to gather, organize, and normalize data to respond to inbound BD requests. Succession plans are in place for the eventual departures of senior BD team members and attorneys. Selling is still primarily carried out by attorneys.

DATA SAVVY

There is a centralized BD function led by a CMO or CMBDO with data management resources and assistance from other support functions, practice groups, key stakeholders, and partners. The firm has a recruitment pipeline for new business developers and marketers. BD is primarily carried out by attorneys, but business developers and marketers are increasingly client-facing.

DATA DRIVEN

The BD team has firm-wide reach and working data-sharing relationships with complementary functions, practice areas, and partners. A complete continuity plan is in place and a robust recruiting pipeline is supported by actively promoting the data-driven nature of the BD function. BD professionals are often client-facing and take an active role with managing and expanding existing client relationships.



MOVING TO DATA AWARE:

- 1) Identify and build a roadmap for the additional internal resources needed for BD, KM, CI, and IT to use outside data sources for BD
- 2) Develop basic redundancies to protect firm institutional knowledge and ongoing profitability



MOVING TO DATA PROFICIENT:

- 1) Scale BD teams to more effectively respond to data requests and build out complementary functions, such as KM and CI
- 2) Implement detailed succession plan to safeguard firm data and ensure continuity within the BD and marketing teams



MOVING TO DATA SAVVY:

- 1) Optimize BD team by hiring CMO or CMBDO, data scientists, analysts, and data management professionals.
- 2) Begin building BD talent pipeline and continue optimizing and advocating for growth of KM, CI, and IT teams



MOVING TO DATA DRIVEN:

- 1) Complete roadmap for developing a forward-looking BD team and mature complementary functions
- 2) Leverage BD talent pipeline to continually grow and improve the BD function and promote the firm as a place to be for BD



ABOUT UNICOURT

UniCourt is a Legal Data as a Service (LDaaS) company, providing real-time court data and legal analytics you can trust powered by the only API-first platform in LegalTech. UniCourt's mission is to make legal data more organized, accessible, and useful for AmLaw firms and Fortune 500 companies. The UniCourt Enterprise API is the gold standard in legal data, enabling rapid API integration, delivering real-time updates, and enabling optimal litigation outcomes. Learn more at www.unicourt.com.

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Baretz+Brunelle is a leading legal industry advisory firm that helps businesses throughout the evolving marketplace to stand above. Our clients are mainly elite law firms, and we also serve premier legal tech companies, innovative alternative legal services providers and others within the legal ecosystem. B+B launched its NewLaw practice in January 2020 to serve the industry as it faces its biggest challenges in delivering legal services. Our extensive research of law departments and cultivation of deep relationships with inside counsel, legal operations and other buyers of legal services have elevated our ability to assist sellers of legal services. The practice is led by two legal industry veterans, Brad Blickstein and Beatrice Seravello, who have an unparalleled understanding of the inner workings of law firms and legal operations as well as the client-side technology function. Learn more at www.baretzbrunelle.com.

