

Key Elements of an Effective Law Firm Proposal-Automation System

By implementing an effective proposal-automation system, you will significantly reduce the amount of time required to create and deliver proposals.

Law firms typically spend hundreds of hours each year creating proposals for existing and prospective clients. Proposal creation is a time-intensive process for most firms because vast amounts of decentralized information must be manually located, organized, and assembled into a single compelling document. Unfortunately, this painstaking process must be repeated each time a new proposal is needed.

If this scenario sounds familiar, your firm should consider automating the proposal-creation process. By implementing an effective proposal-automation system, you will significantly reduce the amount of time required to create and deliver proposals. An effective proposal-automation system does the following:

Automate the Entire Proposal-Creation Process

To realize true value from your proposal-automation system, the entire proposal-creation process must be automated. For example, imagine an assembly line with several workstations. To create a finished product, you start with a single piece, and then move that piece through the line, adding new pieces at each station. By the time you reach the final station a complete product has emerged.

The proposal-automation process should mirror this assembly line model. In the proposal-creation process you typically start with a single element-raw information. Your system should then provide a series of tools and menu options that help you shape the information, guiding you through the creation process and adding essential elements until your proposal is finished.

Centrally Store Information

Any factory with an assembly line also stores the parts used in the assembly process. Likewise, an effective proposal-automation system should include a storehouse of essential components.

To help you create proposals quickly and easily, an advanced proposal-automation system typically stores a set of existing and commonly used content. You can select some of this content-including attorney biographies, practice area descriptions, and publications-to insert into your proposals. In an effective system, this common content should only have to be entered once; it should then be available every time someone creates a proposal.

For example, an attorney biography saved into your system should be available for you to use in all future proposals. Instead of copying, pasting, and formatting the same biography each time you create a new proposal, you would only need to select the biography by clicking its title-the formatting and insertion should be automatic.

Reuse Your Existing Resources

To create factory assembly lines, companies often use parts of existing assembly lines and thereby avoid "reinventing the wheel." By re-purposing their existing resources and equipment, companies can save substantial amounts of time and money.

Similarly, an effective proposal-automation system can use information stored in other systems. For example, much of the information included in proposals is often already in finished form on Web sites or intranet sites. A good proposal system should be able to retrieve this information and include it in the automation process.

You can also maximize your resources by reusing previous work. A previously completed proposal can be duplicated and then slightly modified to serve the needs of another client. Firms can therefore use old proposals as templates for new proposals. An effective proposal-automation system should provide a simple way to accomplish this, without copying and pasting, or reformatting.

Create Proposals in Multiple Document Formats

As they near the end of the assembly line, products are sometimes diverted to various locations according to specific needs. For example, a car assembly line might divert cars to different locations for customization some cars might need CD players while others need additional chrome fixtures.

Proposal automation should, again, emulate the assembly line model. In some cases the finished proposal should be published in Microsoft Word format, while in other instances PDF format is specified. Proposals are sometimes also published to secure Web sites. A robust proposal system should allow you to choose the format of the finished proposal and then automatically produce your document whenever you request it.

Deliver Proposals via the Web

In a factory assembly line the finished product must be delivered by physical means; it cannot be delivered using the Internet. Proposals, however, are not subject to the same limitations. You can easily post a completed proposal to the Web, where your client can then view it after entering a username and password.

Because most people don't know how to create or publish Web pages, a complete proposal-automation system should enable your firm to automatically deliver the finished proposal as a customized Web site, without requiring any specialized technical skills or knowledge.

Offer Multiple Delivery Methods

Just as an assembly line gives you many delivery options (FedEx, UPS, etc.), so should your proposal automation system. And delivery-like the other proposal-creation processes-should be completely automated.

Once your proposal is complete, you may want to send it via e-mail as a PDF or Microsoft Word document. You may also want the flexibility to publish the proposal to a secure, password-protected Web site. Regardless of the delivery method you select, an effective system should automate and record the delivery as well as provide the framework required to measure effectiveness (addressed in the next section).

As an additional benefit, your proposal-automation system should interface with your firm's Client Relationship Management (CRM) system, allowing you to easily specify recipients and automatically deliver your proposal.

Measure Results with Broad and Focused Statistics

Manufacturing companies use sophisticated techniques to measure the success of their assembly lines and manufacturing processes. Law firms also measure success, but in a different way.

A law firm's proposal system must provide an automated method of measuring success. For example, your reports and statistics should answer at least the following questions:

- Who in the firm uses the system?
- How often do they use the system?
- Did a client view a specific proposal?
- When did the client view a proposal (date and time)?
- How many times did the client view a specific proposal?
- What proposal pages did the client read, and what pages were ignored?

A Case for Proposal Automation

By implementing a full-featured proposal-automation system, you can save your firm hundreds of hours and thousands of dollars each year. As discussed previously, a truly effective system does the following:

- Automates the proposal-creation process
- Centrally stores information
- Reuses your existing resources
- Creates proposals in multiple document formats
- Delivers proposals via the Web
- Offers multiple delivery methods

Measures results with broad and focused statistics In other words, such a system ensures that your final document is complete, compelling and produced at a fraction of the cost incurred by manual proposal creation.

For more information contact Greg Fredette, Managing Partner, greg@saturnodesign.com.