



From contact to client:

Relationship-Driven BD for Law Firms

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In today's competitive legal market, firms face increasing pressure to strengthen client relationships, demonstrate value, and win new business—all while contending with internal silos and, at times, limited visibility into firm-wide efforts.

This webinar will explore the key challenges legal professionals encounter, including how to build trust in a crowded marketplace, make client development more intentional, and ensure that everyone—from partners to business development teams—is aligned and equipped to drive sustainable growth.

Hear practical strategies for:

- Strengthening and expanding key client relationships without overburdening busy attorneys
- Turning everyday interactions into business development opportunities
- Improving collaboration across departments to avoid duplicated or missed efforts
- Gaining better visibility into client engagement, firm activity, and growth potential
- Moving from reactive to proactive business development strategies

Learn how leading firms are shifting their approach from transactional outreach to intentional, relationship-driven growth—one contact, one client at a time.

Key trend

Clients are **less loyal**

- “Even longtime clients who’ve spent millions of dollars with us and have never gone to our competitors are starting to bid out the work.” – M&A Partner
- “Every professional service decision we make will be competitive.” GC F100 Company
- “Theres never a downside to hearing other firms pitch for our business, we owe it to our company to be on the look out for new providers.” – CFO, Financial Services Co.

“We’d go with the same professional services partner or **firm we’ve used in the past.**”



(DCM Insights)



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Sales And Marketing

What Today's Rainmakers Do Differently

Business development at professional services firms is outdated. Here's what works now. by Matthew Dixon, Ted McKenna, Rory Channer and Karen Freeman

From the Magazine (November–December 2023)

**HBR'S
10
MUST
READS**

BONUS ARTICLE
"Use Strategic Thinking to Create the Life You Want"
By Rainer Strack, Susanne Dyrchs, and Allison Bailey

The definitive management ideas of the year from Harvard Business Review.

2025

Commit

Prioritize BD time
and client outreach –
**without
overburdening
lawyers!**

Connect

Engage with others
to deepen relationships
and expand networks

Create

Proactively find new
opportunities and
share them with
clients and colleagues

Commit

Prioritize BD time
and client outreach –
**without
overburdening
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Thought Exercise



Signals, Digests, Reports

Commit

Build a routine for BD tasks, and leverage your firms technology to do so.

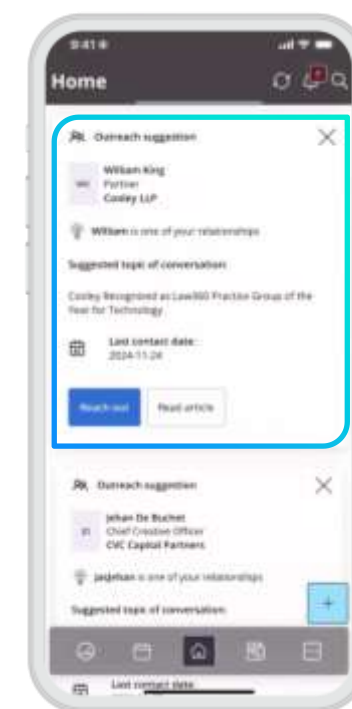
Business outcomes to the firm:

- ✓ Increased BD activities through alerts, prompts and reminders pushed to Partners to help make BD easier
- ✓ Improve collaboration between partners and BD/Marketing team

Enabled by key capabilities:

- Proactively send pre-meeting briefing reports on key clients and contacts to make BD easier
- Prompt to capture post-meeting notes to identify opportunities to bring more value to client
- Signal BD actions including reviewing contacts on event lists, following up on open RSVPs, provide information on pursuit and experience matters

Notifications and ‘nudges’ can push information to partners via email or mobile application to help build and keep a more BD focused approach as they deliver legal services





Connect

Engage with others
to deepen relationships
and expand networks



International Bar Association
the global voice of the legal profession

SCGLEGAL[®]
A WORLDWIDE NETWORK OF LEADING LAW FIRMS





Thought Exercise

Relationship Management

Connect

Enable every Partner to leverage the relationships across the firm, to drive more business.

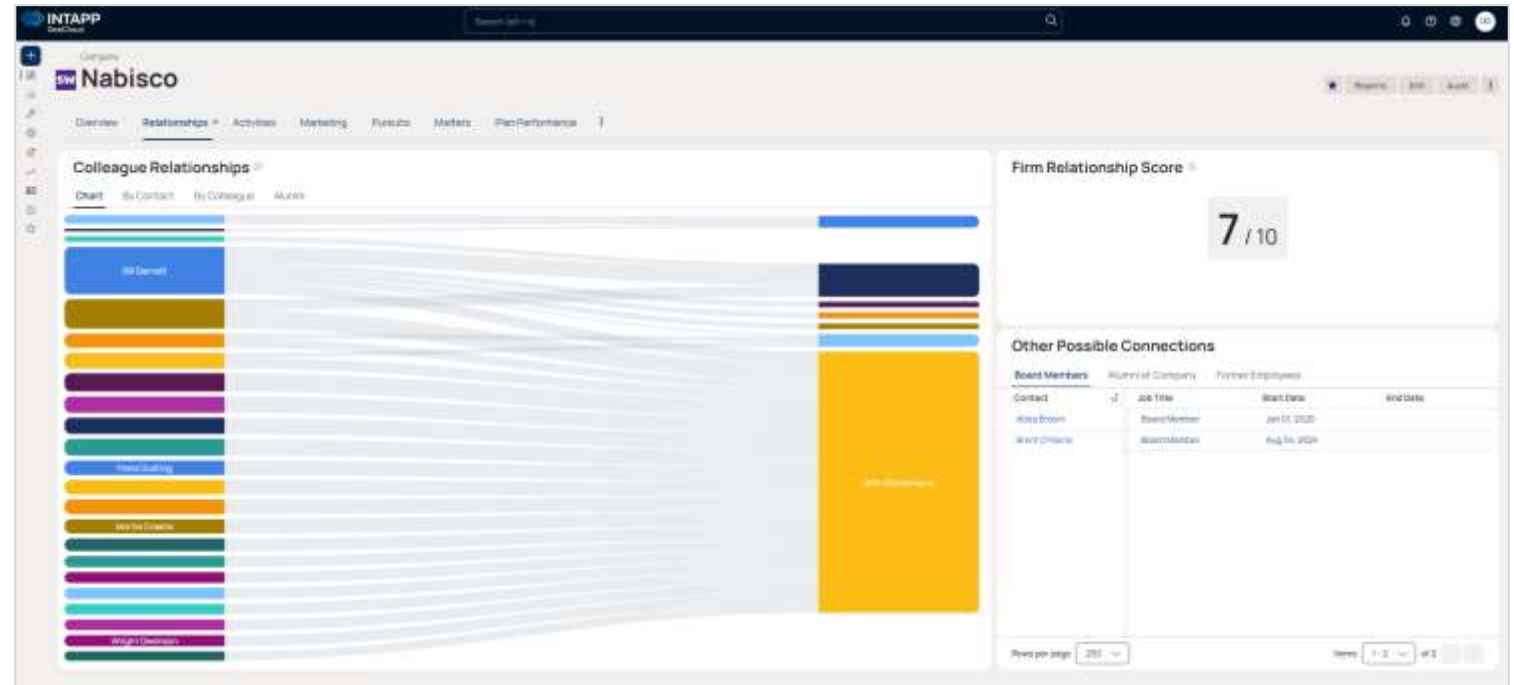
Business outcomes to the firm:

- ✓ Improve targeting, outreach and campaigns with a centralised hub of relationship profiles
- ✓ Identify key trends and prevent relationship neglect with historical reporting & analysis
- ✓ Increase win rates and better insights into outcome of past communications

Enabled by key capabilities:

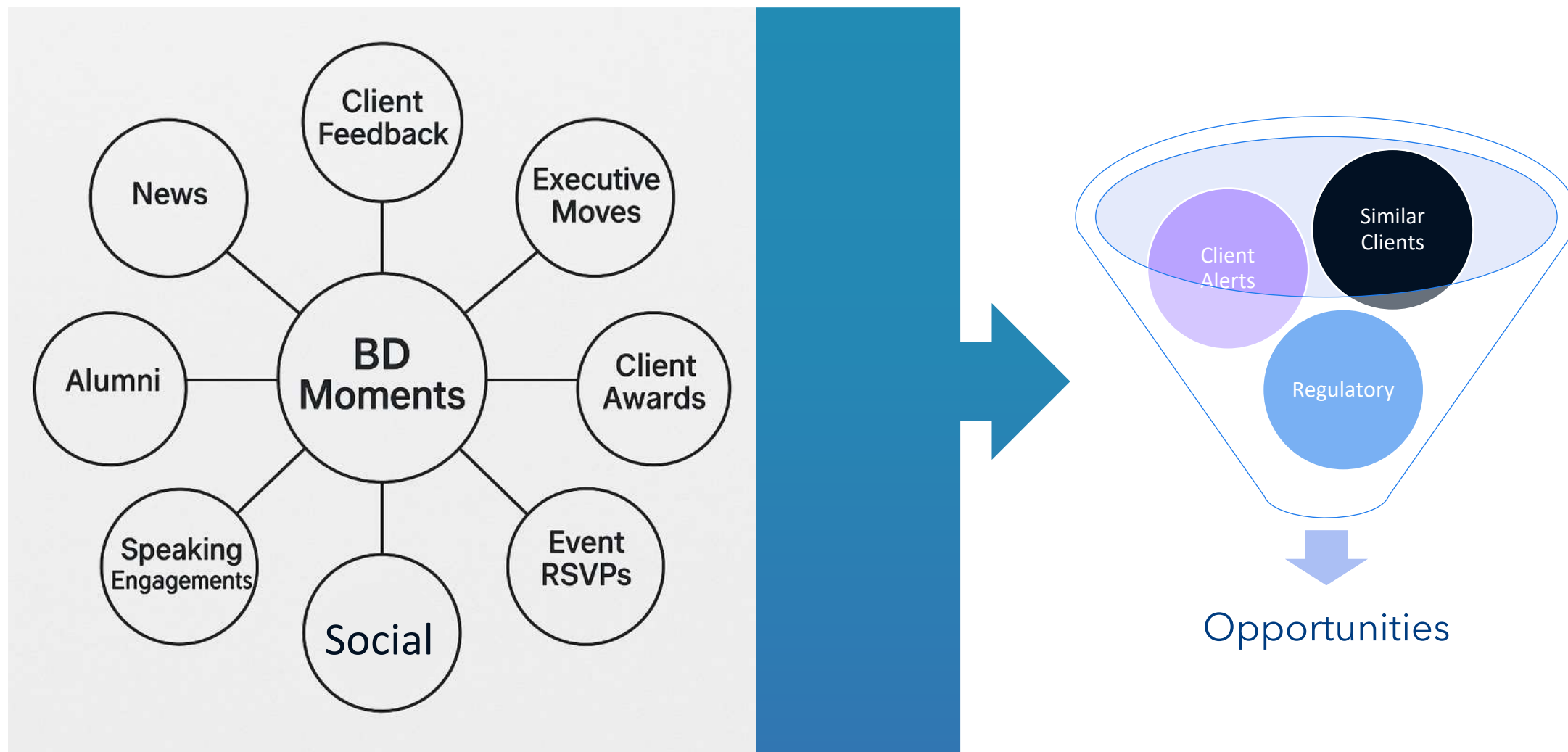
- Automatically capture and maintain accurate contact and company profiles via data capture from MS Outlook and integration with Intapp Data (provided with the platform) and other 3rd party data
- Dynamically surfaces relationship details in context, such as clients, contacts, opportunities, campaigns
- Track key outcomes of last points of contact with automatic communication activity capture

Automate your key relationships, make the network visible to users, which helps you connect across services.



Create

Proactively find new
opportunities and
share them with
clients and colleagues



Create A Compelling Intro/Value Proposition

Many details surrounding this [ISSUE/REGULATION] and its impact on you and your business are still unclear, but I am closely monitoring the situation and have compiled a list of key considerations to help us stay ahead of the curve. Do you have some time to get together with me and my colleague (at no cost) so I can share some thoughts with you while things develop?

We conduct assessments around [TOPIC] at no charge, and I've had excellent feedback from a few of my clients. Would you like me to introduce you to [PARTNER], who has that expertise?

The firm offers an executive briefing on [TOPIC]. Would you like to gather your management team to discuss?

Non—Legal Value-Added Service



Invite Client to
contribute/co-author
client alert



Offer up Firm office
space for traveling
Executives



Create in-house client
training program

Create

Client Intelligence Hub

Simplifies key-account management by operating as a central hub for your firm's collective intelligence

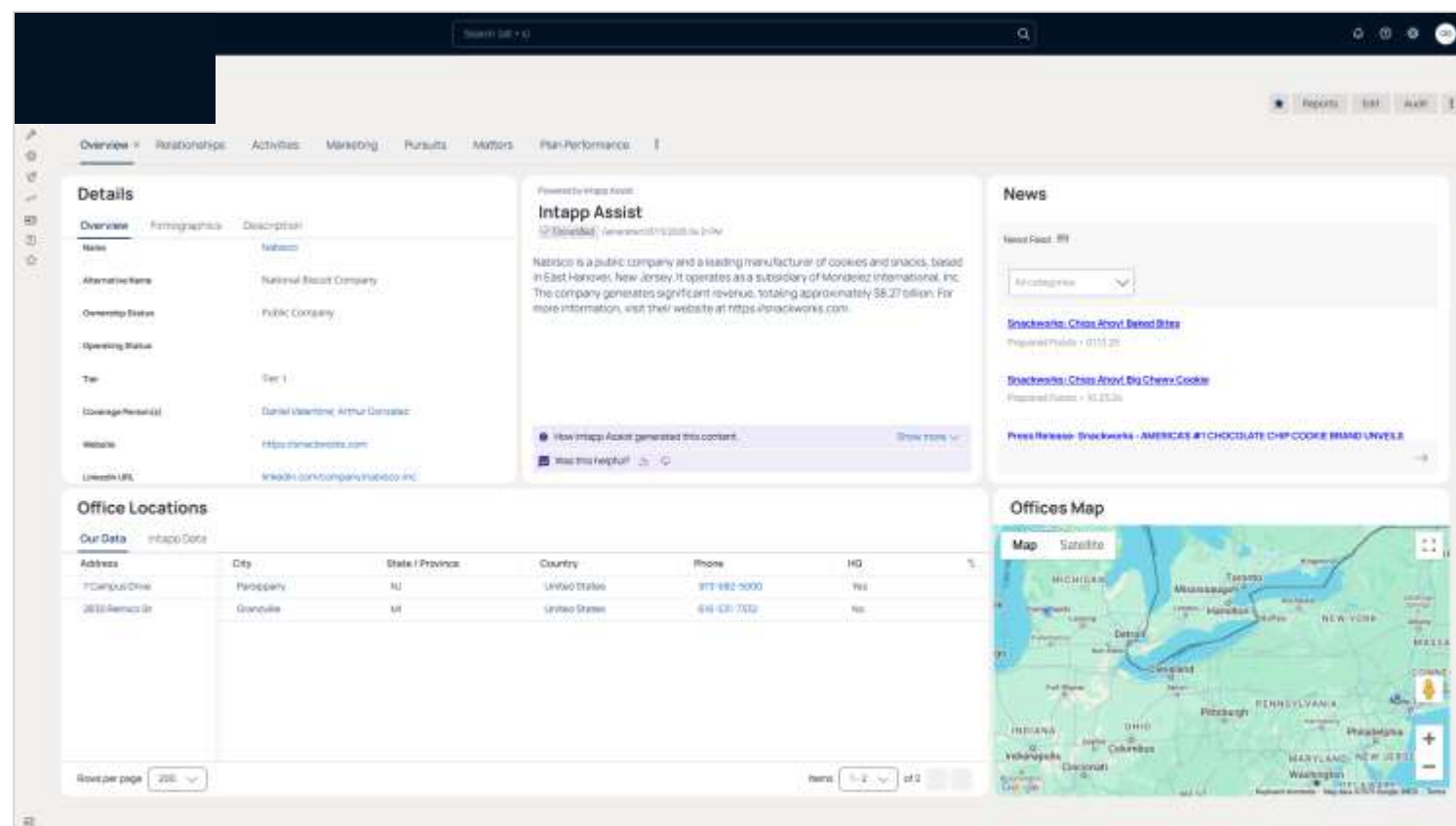
Business outcomes to the firm:

- ✓ Transparency and accountability for the firm
- ✓ Improved data quality and reliability
- ✓ More informed, and data-driven decisions by leadership about firm strategy and direction

Enabled by key capabilities:

- Build client profiles and get real-time insights into historical client relationships and trends with centralized meeting, campaign, content engagement, activity data
- Tear sheets with summarized information automatically produced and/or scheduled for distribution to end users
- Quickly identify strengthening, cooling and untapped connections with advanced relationship mapping
- AI-powered summarization of any engagement, company, or contact page and AI-generated content for key text fields

FIRM surfaces consolidated client views of all related matters, market intelligence, pursuits, win rates, billing etc. captured through tagging and firm-wide activities



The screenshot displays the Intapp Client Intelligence Hub interface. The main section shows a client profile for Nabors, including details like Name, Alternative Name, Ownership Status, Operating Status, Tier, Coverage/Person(s), Website, and LinkedIn URL. A sidebar on the right provides an overview of the client's performance, including a summary of the company and a list of related news items. Below the profile, there is a section for Office Locations, which includes a table of addresses and a map showing the locations of the offices.

Address	City	State / Province	Country	Phone	HO	%
7000000 Drive	Harrodsbury	RI	United States	919-882-5000	Yes	
2610 Remick Dr	Granville	MI	United States	419-431-7332	No	

Recap & Action Items



COMMIT

Dedicate 15 minutes a day to business development activities



CONNECT

Connect with a prospect or client on LinkedIn with a personalized message



CREATE

Make one warm cross-practice introduction

Interested in learning more?



Chris Raymond
Intapp



LinkedIn