Databender

FREE GUIDE

Win More Pitches

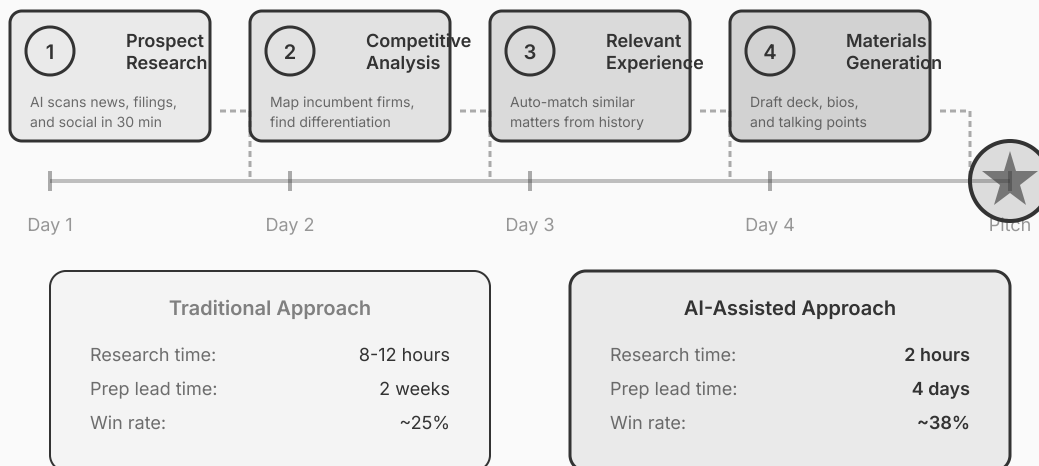A Law Firm's Guide to Experience Intelligence

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38%
Win Rate

Firms using AI-powered pitch prep see win rates increase from 25% to 38%.

AI-Powered Pitch Preparation Timeline

1 Prospect Research	**2** Competitive Analysis	**3** Relevant Experience	**4** Materials Generation
AI scans news, filings, and social in 30 min	Map incumbent firms, find differentiation	Auto-match similar matters from history	Draft deck, bios, and talking points

Day 1   Day 2   Day 3   Day 4   Pitch

Traditional Approach

Research time:	8-12 hours
Prep lead time:	2 weeks
Win rate:	~25%

AI-Assisted Approach

Research time:	2 hours
Prep lead time:	4 days
Win rate:	~38%

Your firm has done the work. Hundreds of matters. Thousands of briefs, memos, and contracts. Decades of expertise from partners who've seen every variation of every problem.

But when a pitch opportunity lands on Thursday for a Monday meeting, none of that matters. Because you can't find it.

Someone sends an email blast: "Has anyone worked on pharmaceutical licensing disputes in the Midwest?" Partners check their calendars, try to remember what they worked on three years ago. Associates dig through document management systems with search functions that haven't improved

since 2008. By the time you've assembled a picture of the firm's relevant experience, half your prep time is gone.

Meanwhile, your competitor pulled their experience summary in twelve minutes. They're spending their time tailoring the pitch. You're still doing archaeology.

> *The firms winning more pitches don't have better rainmakers. They have better retrieval.*

What Is Experience Intelligence?

Experience Intelligence is a simple concept: making everything your firm has ever done searchable in plain English, instantly.

Not keyword search. Not Boolean queries. Natural language questions like:

- "What M&A work have we done for medical device companies?"
- "Show me securities litigation matters over $50M in the past five years"
- "Who has relationships with executives at companies in the Chicago healthcare market?"

The system searches across matters, documents, emails, and contact histories. It returns answers with citations. Associates get the firm's collective memory in seconds instead of days.

This isn't science fiction. It's what AI makes possible now, at costs that would have been unthinkable two years ago.

The Retrieval Problem

Most firms have three sources of institutional knowledge, and all three are broken.

> **Partner Memory.** Ask who's worked on a type of matter and you get whoever answers the email first. Not necessarily the right person. Just the one who checked their inbox. The partners who've done the most relevant work might be in court, on vacation, or simply bad at email. Their

> experience doesn't surface.

Worse, memory is unreliable. A partner remembers the big wins. The routine matters blur together. That perfectly relevant engagement from 2019? Forgotten.

> **Document Management Systems.** The firm's DMS contains everything. In theory. In practice, finding what you need requires knowing exactly what you're looking for. Search for "pharmaceutical" and you get 47,000 results. Search for the specific matter name and you find it instantly, but only if you already knew the matter name. Which you didn't, because that's what you were trying to find out.

Associates learn workarounds. They keep personal folders. They bookmark useful documents. When they leave, those workarounds leave with them.

> **The Relationship Gap.** Client relationships live in individual inboxes and heads. Partner A has a strong relationship with a target company's CFO. Partner B is pitching that company next week. They don't know about each other. The pitch goes out without mentioning the existing relationship. The firm looks disorganized. Or worse, the relationship never surfaces at all.

A mid-sized firm we spoke with did an audit and found that partners were unaware of existing relationships with pitch targets in 40% of new business pursuits. Forty percent. They were cold-calling companies where colleagues had warm connections.

From 6 Hours to 15 Minutes

Here's what pitch preparation looks like at most firms:

> **Traditional Pitch Prep (6+ hours)**

- Send firm-wide email asking for relevant experience (wait for responses)

- Search DMS with various keyword combinations

- Call three partners who might remember relevant work

- Dig through matter descriptions in billing system

- Ask marketing for any existing materials on this client or industry

- Manually compile findings into pitch format

- Hope you didn't miss anything obvious

Now here's what it looks like with Experience Intelligence:

> **AI-Powered Pitch Prep (15 minutes)**

- Query: "Show me our experience with [target's industry] including matter outcomes"

- Query: "Who has relationships with [target company] or their executives?"

- Query: "Find similar pitches we've done and their win/loss status"

- Review AI-compiled summary with citations to source documents

- Spend remaining time tailoring the pitch instead of finding information

The difference isn't just time. It's what you find. AI surfaces relevant experience that keyword searches miss. It connects matters across practice groups. It finds the relationship with the target's board member that nobody remembered to mention.

One litigation boutique implemented Experience Intelligence and discovered they had represented a pitch target's parent company eight years earlier. Nobody on the current team had been involved. The connection never would have surfaced through email blasts or memory. It won them the engagement.

The Economics Changed

Two years ago, building this kind of system required a seven-figure budget and a year of development. Enterprise legal tech vendors charged accordingly. Mid-sized firms were priced out.

AI changed the math. What cost $500K now costs $30-50K. What took twelve months takes weeks.

The shift happened because the hard part of building these systems (teaching computers to understand natural language, to connect concepts, to reason about relevance) is now handled by foundation AI models. The remaining work is connecting those capabilities to your specific data. That's still real work. But it's weeks of work, not years.

The firms moving now are building advantages that compound. Every pitch they win adds to their experience database. Every matter they close becomes searchable for the next pitch. The gap between firms with Experience Intelligence and firms without it grows wider each quarter.

What About Privacy?

Legal clients ask this immediately. Rightly so.

Client files contain privileged information. Sending that data to a cloud AI service isn't acceptable. Most law firm ethics committees would reject it outright.

But you don't have to. Experience Intelligence can run entirely on your own infrastructure. The AI processes your documents on servers you control. Nothing leaves the building. Client data never touches outside systems.

This matters for the pitch conversation too. When a prospect asks how you handle their sensitive information, "We built our own AI system that runs on-premise" is a different answer than "We use [cloud vendor]." One demonstrates technical sophistication and commitment to privacy. The other sounds like everyone else.

Several firms have turned their Experience Intelligence investment into a selling point. "We can search twenty years of similar matters to find exactly the right precedent for your situation, and your data never leaves our secure environment." That's a pitch differentiator.

Beyond Pitch Prep

Experience Intelligence starts with pitches because the ROI is obvious. Win one additional matter per quarter and the system pays for itself. But the same infrastructure powers other capabilities:

Research acceleration. Associates asking "How did we handle X situation before?" get answers in seconds instead of hours. The firm's collective experience becomes accessible to everyone, not just the people who happened to work on relevant matters.

Knowledge preservation. When a senior partner retires, their thirty years of expertise doesn't walk out the door. Every memo they wrote, every brief they filed, every strategy they developed remains searchable. New associates tap into that knowledge from day one.

Cross-selling visibility. The corporate partner discovers that a client has upcoming litigation exposure. The litigation group learns about it immediately instead of six months later. Opportunities that would have gone to other firms stay in-house.

Conflict checks. "Have we ever represented anyone adverse to [target]?" gets answered definitively, not based on who remembers what.

What This Actually Looks Like

A partner at a 45-attorney firm described the shift this way:

> *"Before, pitch prep was a scavenger hunt. I'd spend half a day just figuring out what we'd done that was relevant. Now I ask the system a question, get a summary with links to the actual documents, and spend my time on strategy. We're not just faster. We're finding experience we didn't know we had."*

The technology isn't magic. It's pattern matching and retrieval at a scale humans can't match. But the business impact is real:

- Pitch prep time drops by 80% or more

- Relevant experience surfaces that would never appear through manual search

- Relationship connections become visible across the firm

- Associates become productive faster because they can access institutional knowledge

- Partner transitions preserve rather than lose expertise

The Ownership Question

Most legal technology comes with per-seat licensing. Add five attorneys, pay five more licenses. Forever. The vendor owns the software. You rent access.

There's another model. Build the system once, own it outright. No per-seat fees. No recurring licensing costs that grow with your headcount. The code is yours. If you part ways with whoever built it, you keep everything.

Run the math over five years. A 50-attorney firm paying $200 per seat per month for a knowledge management platform spends $600,000 over that period. The same firm could build a custom Experience Intelligence system for $40,000 and own it permanently.

Not every situation favors custom builds. But for core competitive infrastructure like experience retrieval, ownership often makes financial sense. And it eliminates vendor lock-in. Your institutional knowledge isn't trapped in someone else's system.

Getting Started

Firms approach this in stages. The typical path:

Stage 1: Assessment. What documents and data sources exist? Where does institutional knowledge currently live? What's the realistic scope of making it searchable? This takes days, not months. The output is a clear picture of what's possible and what it would cost.

> **Stage 2: Pilot.** Start with one practice group or one document type. Build the system, test it with actual pitch scenarios, measure the time savings. Prove the concept before scaling.

> **Stage 3: Expansion.** Roll out across the firm. Add document sources. Train users. Integrate with existing workflows so the system gets used, not ignored.

The whole process, from assessment to firm-wide deployment, typically takes 8-12 weeks. Not because the technology is slow, but because change management takes time. People need to trust a new system before they rely on it.

Who This Is For

Experience Intelligence makes sense for firms that:

- Have 10+ years of matter history worth searching

- Regularly pitch competitive opportunities where experience matters

- Lose institutional knowledge when partners retire or leave

- Spend significant time on pitch preparation and research

- Want to differentiate on privacy and technical sophistication

It makes less sense for very small firms (under 10 attorneys) where partners know all the firm's work personally, or for practices where experience history isn't a competitive factor.

The Bottom Line

Your firm's experience is a competitive asset. But only if you can find it when it matters.

The technology to make that happen exists today, at costs that mid-sized firms can justify. The firms implementing it now are winning pitches their competitors don't even know they're qualified for.

The question isn't whether this capability matters. It's whether you build it before your competitors do.

> See what Experience Intelligence looks like for your firm. Request a *Knowledge Preservation Audit* or *schedule a conversation*.