

DATABENDER

# Win More Pitches

A Law Firm's Guide to Experience Intelligence

Your firm has done exceptional work for decades. The question isn't whether you have relevant experience—it's whether you can find it when you're pitching for new business.

Most firms can't. When an RFP lands with a 48-hour deadline, the typical process looks like this: send an email blast asking who has healthcare experience, wait for partners to respond based on what they remember, manually compile descriptions from whoever replies, and submit a pitch that represents maybe 60% of what the firm has actually done.

The work you're missing isn't gone. It exists in your files, your matter management system, your old pitches. It's just invisible when you need it most.

## Why Experience Wins Pitches

Clients hire firms they trust to handle their specific situation. Trust comes from demonstrated competence. Demonstrated competence comes from relevant experience.

When a healthcare company evaluates law firms, they're asking: "Has this firm handled situations like ours before?" The firm that can show ten relevant matters beats the firm that shows three—even if both firms have handled ten. The difference is retrieval, not track record.

One litigation firm we worked with lost a significant pitch to a competitor with half their healthcare experience. The competitor simply presented their work more comprehensively. The client chose demonstrated depth over actual depth, because they couldn't see what wasn't in the pitch deck.

*You don't get credit for experience you can't articulate.*

## The Retrieval Problem

Law firms store experience in the worst possible format for retrieval: scattered across matter files, trapped in individual attorneys' memories, buried in old pitch decks nobody can find.

The standard approach to pitch preparation is email-based archaeology. Someone sends "Who has experience with X?" and waits. Partners respond when they remember, if they're not busy, assuming the email doesn't get buried.

This approach fails systematically:

**Memory is incomplete.** Partners remember recent matters and big wins. They forget the routine work from three years ago that happens to be exactly what the prospect needs. The associate who actually did most of the work isn't on the email thread.

**Search doesn't help.** Document management systems search for keywords, not concepts. Looking for "healthcare" might miss the physician practice acquisition you handled because nobody tagged it correctly. The system finds documents containing a word, not matters demonstrating experience.

**Knowledge is siloed.** The partner in Boston doesn't know what the partner in Chicago handled. The lateral who joined last year can't pitch the firm's history because they weren't there. Your firm's collective experience is fragmented across individual attorneys.

**Time pressure compounds errors.** With 48 hours to respond, there's no time for comprehensive retrieval. You go with what you can find quickly, which is never everything.

## What Changes With AI

Modern AI doesn't search for keywords. It understands concepts. This changes pitch preparation fundamentally.

Instead of "find documents containing 'healthcare,'" you can ask "show me all matters involving healthcare regulatory compliance" and get results that include work tagged differently, described in various ways, or never tagged at all. The AI understands what you're looking for, not just the words you use.

One corporate firm we worked with built an experience intelligence system that surfaces relevant matters across their entire history. Partners now ask questions like "what M&A work have we done in manufacturing under \$50 million" and get comprehensive answers in seconds. The same query used to take hours of email and manual compilation.

The transformation isn't just speed. It's completeness. They're finding experience they didn't know they had—matters handled by attorneys who've since left, work from offices they rarely interact with, relevant experience in unexpected practice areas.

## From 6 Hours to 15 Minutes

Traditional pitch preparation for a major RFP might take six to eight hours:

- Send experience request emails (15 minutes)
- Wait for responses, send follow-ups (2-3 hours, elapsed)
- Compile responses into a list (1 hour)
- Research additional details on each matter (2 hours)
- Format for presentation (1-2 hours)

With proper experience intelligence, the same process takes 15-20 minutes:

- Query the system for relevant experience (2 minutes)
- Review and select most relevant matters (10 minutes)
- Export in presentation format (3 minutes)

More importantly, the output is better. The AI-powered search finds matters human memory misses. The firm presents a comprehensive picture of their experience, not whatever people happened to remember on deadline.

# What Firms Are Actually Doing

The firms succeeding with experience intelligence share common approaches.

**They connect experience to matter data.** The richest source of experience information is your matter management system. Every matter has a client, an industry, a practice area, key issues. AI can parse this structured data and connect it to the unstructured descriptions in pitch documents and work product.

**They capture experience continuously.** Rather than reconstructing experience at pitch time, leading firms capture it as work concludes. A brief closing memo for each significant matter—client, industry, key issues, outcome—creates a searchable record that compounds over time.

**They make it easy to use.** Experience systems that require training don't get used. The best implementations let attorneys ask questions in plain English and get useful answers immediately. If it's harder than sending an email, people will send emails.

**They measure what matters.** Track pitch preparation time before and after. Compare win rates on pitches that use the system versus those that don't. Build the business case with data.

## Building Your Experience Intelligence

You don't need to replace your systems. You need an intelligence layer on top of them.

The core components are:

**Data integration.** Connect your matter management system, document management, CRM, and historical pitch materials. The more sources, the more complete the picture.

**AI processing.** Modern language models can understand the content of matter descriptions, pitch documents, and even billing narratives. They extract structured experience from unstructured text.

**Search interface.** A way for attorneys to ask questions and get answers. Natural language queries that return relevant matters with supporting details.

**Export capabilities.** Generate formatted experience summaries for pitches, RFPs, and client presentations.

Implementation typically takes six to eight weeks. The system gets smarter as it processes more of your historical data, and continues improving as new matters close.

## The Lateral Partner Problem

New lateral partners face a specific challenge: they brought relationships and expertise, but they can't pitch the firm's historical experience because they weren't there.

Traditional firms address this through informal mentoring and email requests. The lateral asks around, gets partial answers, and gradually learns what the firm has done. It takes months or years

to develop working knowledge of firm capabilities.

Experience intelligence collapses this timeline. The lateral partner can search the firm's complete history from day one. They pitch the full depth of firm experience, not just what they've learned through conversation.

One firm told us their laterals become fully productive on firm pitches within weeks instead of months. The experience isn't trapped in long-tenured heads—it's accessible to everyone.

## Beyond Pitches

Experience intelligence serves pitch preparation, but the same capability transforms other workflows.

**Client retention.** When a client raises a new issue, instantly surface all relevant experience across the firm. Show clients the full depth of your capabilities, not just what their relationship partner knows.

**Cross-selling.** Identify clients who could benefit from services they're not currently buying. The AI connects client industry profiles to relevant capabilities across practice groups.

**Conflict checking.** Beyond standard conflicts, surface experience that might create business conflicts or competitive sensitivities. Know what you've done for competitors before the issue arises.

**Attorney development.** New attorneys learn faster when they can access the firm's experience on any topic. Instead of asking around, they search. Instead of recreating, they build on precedent.

## Getting Started

Start small. Pick one practice group with active business development needs. Build experience intelligence for their matters. Prove the value before expanding firm-wide.

Measure aggressively. Track pitch preparation time. Count matters surfaced that would have been missed. Compare win rates. Build the case with evidence.

Make it invisible. The goal isn't a fancy new system that requires training. The goal is answers when attorneys need them. If they can ask a question and get useful results in under a minute, they'll use it.

The firms that retrieve experience better will win more business. The experience is already there. The question is whether you can find it.

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*Ready to transform how your firm retrieves experience? Schedule a conversation or explore our legal-specific solutions.*