

Achieve Consistent, High-Quality Data with Dynamic Knowledge Management

CHOATE

ABOUT CHOATE

Choate Hall & Stewart LLP ("Choate") is a Boston-based law firm servicing national and international clients on a core group of strategic practice areas. The transactional practices include: Private Equity, Finance & Restructuring, M&A, Venture Capital, and Capital Markets. Choate employs 180 attorneys and more than 300 administrative support staff, including ten team members in marketing, business development, and business intelligence for the five transactional practices. In 2016 Choate generated in excess of \$200 million of revenue.

Website

www.choate.com

Industry

Law Practice

Locations

Boston, MA

The Challenge

Before Pitchly, Choate's marketing team responded to requests for transaction information and tombstone experience documents by searching an access database and manually creating tombstones in Microsoft™ Word. In aggregate, the team spent dozens of hours per month locating, fact-checking, and formatting information and tombstones for attorneys.

"Frankly, it was time-consuming to pull together marketing materials for our transaction practices," said **Sonia Mangino, Assistant Director of Business Development**. We needed a single point of access for information and a tombstone management solution that took minutes instead of hours."

The Search

Choate had worked with Knowledge Management Solutions in the past and understood their limitations storing and locating transaction-specific information and managing a tombstone experience library. After conducting a comprehensive search, Choate requested a series of webinar demonstrations with key decision-makers in marketing, business intelligence, and the Private Equity practice group before selecting Pitchly as its preferred provider.

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Claire Thompson

Senior Business Development Manager

“Pitchly provides a simple solution to store detailed information about transactions for attorneys and marketing collateral and data for our team. The ability to export tombstones directly to PowerPoint and conduct detailed searches using the filter has made Pitchly our preferred Experience Management system.”

“The first time we logged in, we were excited to be able to pull together a page of tombstones in minutes.”

Stephanie Raven

Business Development Assistant



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We purchased Pitchly to manage our Tombstones, but it quickly became the preferred Knowledge Management Solution for the Business Development team.

Claire Thompson

The Implementation

Pitchly worked with the Choate team to create a consistent database to accommodate the different data needs of the five transactional practice groups and implement a consistent tombstone theme.

“The Pitchly team took the time to understand our needs and configure their software to accommodate our workflow and data needs,” said Thompson.

Choate was up and running nine days after Pitchly’s receipt of final information. The Pitchly team migrated Choate’s existing transaction information from multiple excel spreadsheets and provided advice on relevant fields and data structure types. In addition, the Pitchly team conducted a logo collection service finding corporate logos for hundreds of tombstones and creating the initial tombstone templates.

The Results

After implementation, the transactional business development team input new transactions, registered recent league table submissions data, and searched and exported tombstones for proposals.

“The tombstone functionality saves me hours each week fulfilling attorney requests,” said Raven.

The Benefits

Pitchly allowed Choate to migrate and consolidate transactional practice group deal records into a permission-based cloud software. During this process, the consistency and quality of information improved and the rules and methods enforced by Pitchly ensure a high quality of data is maintained.

Implementing Pitchly Allows Choate to:

- Create consistency between practice group data
- Standardize tombstone design between practices
- Manage a central master deal data source
- Search and export Tombstones to PowerPoint
- Notify league table providers of new deals easily
- Protect private information from release
- Mitigate knowledge loss from attorney turnover

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Discover how other Pitchly customers are making their data accessible, yet safe and secure, and bypassing the challenges of stringent data requirements.

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