

Achieve Consistent, High-Quality Data with Dynamic Knowledge Management

How Pitchly helped the Choate law firm put their experience data to work

AT A GLANCE

The Challenge

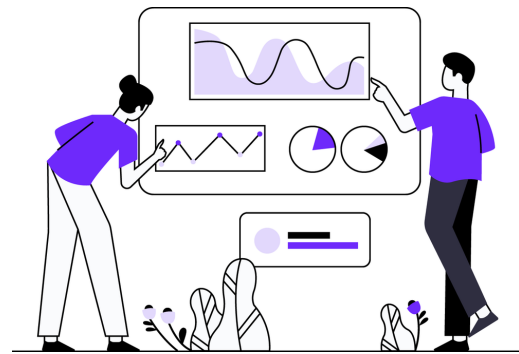
Time wasted searching databases and creating tombstones.

The Solution

Consolidating transaction data into one place, tombstone templates, and Pitchly's tombstone functionality.

The Results

Hours saved each week, data consistency, and a single database of data to reference.



The Challenge

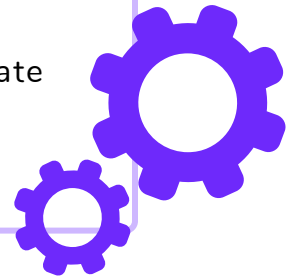
Before Pitchly, Choate's marketing team responded to requests for transaction information and tombstone experience documents by searching an access database and manually creating tombstones in Microsoft Word. In aggregate, the team spent dozens of hours per month locating, fact-checking, and formatting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



“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.”



Claire Thompson
Sr Business Development Manager

The Implementation

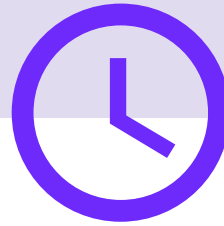
Pitchly worked with the Choate team to create a consistent database to accommodate the different data needs of the five transactional practice groups and implement a consistent tombstone theme.

“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 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



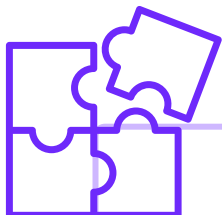
The Results

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.

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

Claire Thompson
Sr Business Development
Manager



The Benefits

Pitchly enabled 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 Empowered 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

The Pitchly Difference

Your data is one of your most valuable assets, but so is your time.

Pitchly allows you to put all of your data into a single, filterable database to cut down the time it takes for previously manual tasks like tombstone creation. When you can rely on our systems to ensure that your data is quickly and reliably getting where it needs to go, you get that time back to focus on the strategy work that matters.

So start putting your data to work today. [Get Started Now](#)

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.

About Pitchly

Pitchly is a SaaS company based in Des Moines, IA. The Pitchly platform was built for **data enablement**. Our mission is to enable data in a way that helps people spend more time on the things that matter to them, and less time on the mundane. And with our platform, we put data to work through automations that save time, improve performance, and allow your workers to focus on what matters most.

Primary industries served include: Law firms, Finance, Consulting, Insurance, Executive Search, and Professional Services.

Discover more stories from our clients and see how they put their data to work with Pitchly.

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