



Ikaun Centralizes Mid-Sized Firm's Experience Data to Support Growth Objectives

Background: Disjointed Manual Processes Not Built to Scale

This mid-sized firm based in Washington D.C. brought on a new Chief Marketing Officer (CMO) from a large firm to support the firm's growth strategy by expanding new business and enhancing existing client relationships. To achieve this, the CMO's top priority was to bring a more structured and scalable approach to managing the firm's experience data, which was crucial for business development, client relationship management and proposal generation.

To date, the firm had been relying on manual tools like Word documents and Excel spreadsheets to track and store critical information, which made the data scattered and challenging to access.

The firm also faced significant challenges in maintaining accurate and up-to-date records of its lawyers' experience.

Data was scattered across multiple tools and formats, making it difficult to locate relevant information quickly and consistently. The manual nature of their processes often resulted in inconsistencies and outdated information being used in pitches and proposals, leading to a lack of confidence in the firm's ability to present its capabilities effectively.

These pain points were compounded by the need to create a scalable system that would grow with the firm. The CMO recognized that without a centralized and reliable repository of experience data, the firm would only continue to struggle to streamline its business development efforts and make informed decisions about client engagements.

Recognizing the limitations of this approach, the CMO set out to find a centralized solution that would consolidate all of their experience data in one place and improve overall efficiency. This market-wide investigation led them to ikaun.

ikaun: A Seamless Transition to a Centralized Platform

After conducting thorough research into experience management and proposal generation tools, the firm discovered ikaun. The firm considered various options but ultimately chose ikaun because of its comprehensive capabilities in transforming a disjointed data management system into a cohesive and continuously updated single source of truth.

The decision was driven by ikaun's ability to centralize experience data efficiently, automate proposal generation, and seamlessly integrate with the firm's existing systems, making it the ideal solution to support their strategic goals.

The implementation process began with a detailed discovery phase, where ikaun's team collaborated closely with the firm to understand their existing workflows and data management practices. This phase involved mapping out their current processes, identifying key areas of improvement, and setting clear goals for transitioning to a more centralized experience management system.

Top challenges faced by the firm:

- ✓ Fragmented Data Management
- ✓ Inefficient Proposal Generation
- ✓ Lack of Centralization
- ✓ Limited Scalability
- ✓ Inconsistent Knowledge Sharing

Solutions Powered by ikaun:

- ✓ Centralize Experience Management
- ✓ Automate Proposal Generation
- ✓ Real-Time Data Integration
- ✓ Enhance Search and Accessibility
- ✓ Scalable and Customizable Platform



Over the course of three to six months, ikaun guided the firm through a structured implementation that included data migration, system configuration, asset collection and analysis, solution design and customization, data pipeline development, and then, of course, training and rollout to the firm's team members.

The process was designed to minimize disruptions to the firm's daily operations while ensuring a smooth transition to the new platform. ikaun's team provided consistent communication, regular checkpoints, and hands-on support to address any challenges that arose, resulting in a streamlined and efficient onboarding experience.

Results: Transforming Data Management and Business Growth

"The adoption of ikaun's experience management platform has been a game changer for the firm," comments the CMO.

What once took hours of manual effort to compile and update experience data now takes only minutes, significantly enhancing the firm's productivity and enabling faster turnaround times for proposals. Centralizing all experience-related information into one unified platform has improved data accuracy and accessibility, making it easier for teams to collaborate and share knowledge seamlessly.

The firm has reported a substantial boost in their ability to generate new business and expand client relationships, supported by the consistent and reliable data now available at their fingertips. Ikaun's automated solution has not only streamlined proposal generation but also empowered the firm to focus on higher-value strategic initiatives that drive growth.

One of the most significant outcomes has been the firm's ability to scale its business development efforts confidently, knowing that its experience data is both comprehensive and up-to-date. As a result, the firm has seen measurable improvements in its bottom line, with the CMO attributing a significant portion of their recent growth to the efficiency gains enabled by ikaun.

In reflecting on the transformation, the firm's CMO remarked, "Ikaun has allowed us to move beyond the day-to-day challenges of managing experience information, enabling us to focus on what really matters—growing our firm and delivering exceptional value to our clients."

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Mid-Size Firm CMO

About ikaun

ikaun is a world-class experience management platform for the professional services industry. Built based on the needs of business development, marketing, and knowledge management, ikaun offers a unique solution for streamlining how experience is discovered, shared, and reused by business development and fee earners.

