Jackson Walker LLP

CI on the Fly - Creating a User-Friendly Report

Caren Luckie
Research Attorney
Jackson Walker LLP

With thanks to Mark Gediman, Best Best & Krieger LLP

CI is

Information ethically gathered and analyzed to make the firm more competitive and profitable in the ever-changing marketplace

A/k/a Business Development

CI is not

Unethical behavior

Spying

CI should be

Part of the Library and/or Marketing – not a minor part

Ideal – Library and Marketing work together

What CI covers

The market – news, market share

Business – business of the firm (internal client metrics, laterals, firm info)

Client – cross-marketing opportunities, RFPs

Competitors – fees, legal services agreements, competitor client lists

Reporting

Consider –

How soon

Purpose

Audience

Things to Keep in Mind

Attorneys are used to seeing information in certain ways

For example – a research memo

Factors affecting every report

How does it fit in with the strategic vision of the firm and PGs

What data points are important to the requestor

Anything unique to requesting attorney

Turn-around time

Make it interesting

Use colorful prose

Make it interesting – include information that would make good talking points

example: charities supported by CEO/GC

Include any potential issues

example: any cash flow problems?

Use Graphics

Screen shot

Graph/chart

Key	NOS	Count	Percent	Legend
710	Fair Labor Standards Act	1	33.33%	
110	Insurance	2	66.67%	

Different contexts

Prospective client

Existing client

RFP response

Information to include

For prospective clients and/or RFP:

any existing relationships between firm and entity

what other firms are they using

litigation analysis

billing rate comparison, if possible

Information to include

For existing clients:

cross-selling opportunities

emphasize reputation, service and price

Information to include

For report on law firm competitors:

Compare reputation, rates, market share

SWOT analysis

Lateral moves – to and from

Possible merger/acquisition target

How quickly – an hour

Include

prepackaged (ex: Hoover's) report

federal litigation analysis report

Format - email, with attachments, or short memo

How quickly - longer term

Can include more information if you have the resources

- more detailed litigation analysis
- bios on general counsel, and other executives
- more analysis

Format – detailed report

Why is it needed?

Lunch

- existing client
- prospective client

Formal pitch

RFP response

Internal planning

Report options

Memo

Email

Canned report

Full briefing “book”

Format

Print - rarely

Electronic

Email

PDF attachment

Take requestor’s preferences into account

What to include

Table of contents

Things they need to know – include your analysis/conclusions (this is NOT practicing law)

Summary

Executive bios

Company profile

Litigation/Deals

News

Don’t forget

On the cover page

Author

Department/branding

Date prepared

Thank you!

Caren Luckie

Jackson Walker LLP

cluckie@jw.com

@czluckie

https://www.linkedin.com/in/carenluckie