

Rethink Your Approach to the Client Life Cycle



Break Down the Silos Across Each Stage for Better Business Performance

To be competitive, today's professional services firms must adopt a more strategic approach to operations. This includes the systems you use and how you use the data within those systems. There's no one better positioned than Wilson Allen to help your firm meet today's challenges. We've helped hundreds of firms break down the silos across data, systems, and processes to build stronger relationships, work more efficiently, and run more profitably. We can help you too.

Build Stronger Relationships

- Add experience management to pitch development
- Improve adoption and use of existing CRM software
- Better connect and integrate existing data
- Implement strong risk management practices
- Diagnose and treat the health of your CRM and business acceptance processes

Work More Efficiently

- Maximize your adoption and ROI from Elite, Intapp, Aderant, American LegalNet, LexisNexis, OnePlace, Rippe software, and more
- Achieve new levels of custom reporting designed for lawyers, business managers, and other stakeholders
- Streamline client intake and client data management

Run More Profitably

- Harness innovative self-service BI tools to manage firm strategy, operational execution, profitability, people, and business development more effectively
- Support better pricing and cost modeling with more relevant data and more effective tools
- Improve proforma management with an integrated, intuitive, collaborative workflow



Wilson Allen brings together a team of highly respected business and technology experts from Wilson Legal Solutions and Stanton Allen following our completed merger. Learn more at www.wilsonallen.com.

Software, services, and expertise for better business performance