

Rethink Your Approach to the Client Life Cycle

BUILD STRONGER RELATIONSHIPS

Business Development & Acceptance

Identify and win high-value clients

RUN MORE PROFITABLY

Business Intelligence & Performance

Integrate systems and data to make smarter decisions



WORK MORE EFFICIENTLY

Business Operations & Billing

Select and use software to its best advantage

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

Run your firm at peak efficiency and profitability

Wilson Allen combines modern technology, top-rate development, and implementation and support teams that are aligned with and informed by our advisory and application services teams. The result? Tailored offerings that support your specific areas of focus.



Billing Management

Simplify proforma management and gain valuable insight into anticipated billing while enhancing performance. Wilson Proforma Tracker software streamline the end-to-end workflow – from proforma generation to bill distribution – to enable improved billing accuracy, faster billing and collections, and centralised management of billing processes.



Analytics and BI

Today's business leaders need BI solutions that measure performance throughout the entire client life cycle to enable insight and action. Wilson Allen offers two powerful solutions that meet this need – Wilson Ideate and LawDrill Inquiry & Analytics. Both solutions give decision makers the information they need when they need it to improve firm performance.



CRM and Business Development

Fully deploy your CRM system and integrate it in a way that can deliver greater business value. Whether you're in the early stages of a CRM implementation or have a system in place, Wilson Allen can help your firm realize the full return on its CRM investments with the support and guidance of our CRM experts.

Improve business processes and performance

Your business needs are evolving, and so is the technology that supports those needs. With Wilson Allen, you can navigate this changing landscape with greater peace of mind. Engage the industry's most respected team of technology professionals for the following service offerings.



Professional Services

Whether you're adapting to change or focusing on day-to-day activities, we have a deep bench of qualified experts ready to deploy on your behalf. From project managers, trainers, and developers to application specialists and advisors, we're able to respond quickly to any software-related needs. We leverage our collective expertise to act as your technology advocate. You can count on our team to support you throughout the life cycle of your software. Wilson Allen's professional services deliver unprecedented value across your organization and support critical back-office functions.



Technology Services

Achieving a heightened level of performance typically involves some technical configuration and customization. That's where Wilson Allen can help. We'll help you make the best use of your software by adapting it to your firm's requirements. We draw on deep technical expertise, hands-on software experience, and best-practice insight to help you run as efficiently and profitably as possible through your software. Wilson Allen's technical services are ideal for IT and development teams that support back- and front-office technology solutions.



Advisory Services

Technology holds the key to optimizing performance. Your ability to make data-driven decisions impacts how well your business performs. Wilson Allen's business and technology experts leverage in-depth insight into analytics to help support your most strategic decisions. We don't deal in theory. We take your data, make it meaningful, and offer solutions to common and complex business needs. Designed to meet the unique needs of high-level decision makers, our business and technology experts help you manage your firm for profitable growth.