

Building Your Firm's Relationship Intelligence – The Lifeblood of Your Front Office

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Speakers



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Knowledge vs. intelligence



Knowledge

- Siloed relationship data
- Everything lives in someone's email
- Inaccurate and missing data
- Poor time management
- Annoying data entry
- Cutting through the noise



Intelligence



Gaps and challenges

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Knowledge is knowing
a tomato is a fruit...



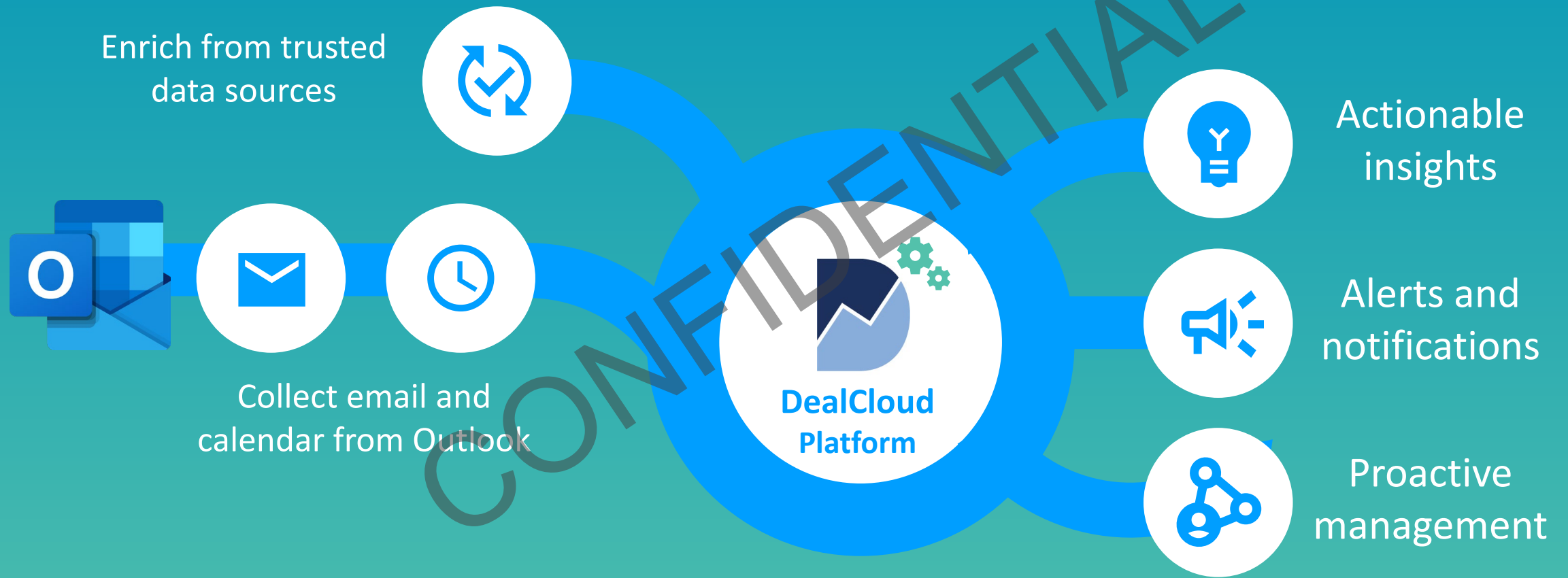
...intelligence is not
putting it in a fruit salad.

Siloed data and administrative headaches

Automating the annoying parts

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How it works



Data capture

Rules-based data quality automation

Automating the annoying parts

 Amanda Workman
To  Saar Menachemi

Start your reply all with:

Hi Saar,
We are presenting at the Intapp City Tour right now!
I hope this presentation is going well.

Amanda Davis Workman
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 Address book sync

 Activity capture

 Signature scraping

Your options:



Opt-in method

AKA “Manually enter everything”



Only the most relevant info



Lots of manual work
Relies on subjectivity



Semi-automated

“Automate — with some human intervention”

Reduces burden on users

Not bulletproof
Relies on some judgment



Full sweep

“Self-driving car”

Totally hands off

Could be overkill
Cacophony

Our recommendation:



Semi-automated

AKA “Automate — with some human intervention”

Automate

- New contract creation
- Signature scraping
- Reject gmail.com

Some human intervention

- Flag contacts with unknown affiliations
- Capture based on tagging

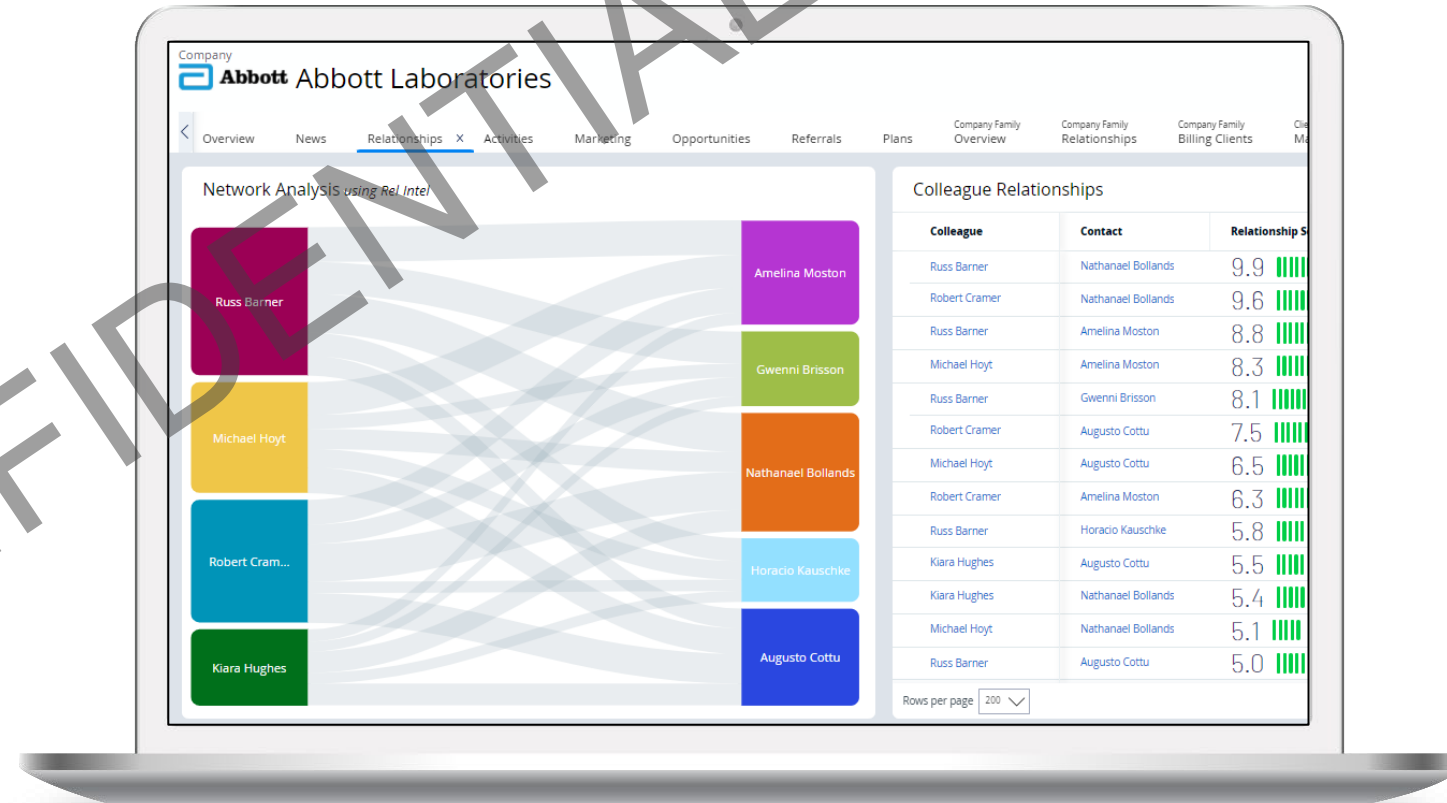
Relationship Intelligence

How the scoring algorithm works

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The value of relationship intelligence

- Visualize your firm's relationship network
- Leverage your strongest relationships to win more deals
- Track relationship trends with key contacts and companies
- Identify which colleagues interacted most recently
- Notify users when contact outreach is needed



Key components



Harvesting and scoring
Emails and meetings



Historical data
Score aging, trend analysis



Visualizations
Historical trends, snapshots, Sankey diagrams



Configurability
Score weighting, alerts/notifications

Who knows Carroll and how well?

Contact
Carroll Lowe

Colleague Relationships

Relationship Score ↓	Colleague	Last Qtr Trend	Last Outbound Email	Last Inbound Email	Last Meeting
8.3 ██████████	Conner Kipke	13%	05/04/22	05/04/22	05/02/22
7.2 ██████████	Emanuel Mesa	5%	05/04/22	05/04/22	05/02/22

Who do we know at Blue Hem and who knows them?

Company
Blue Hem

Operating Company Overview | Contact Details | **Relationship Intelligence** | Performance | Tasks | Market Intelligence | Merger Market Deals | Documents

Network Analysis using Rel Intel

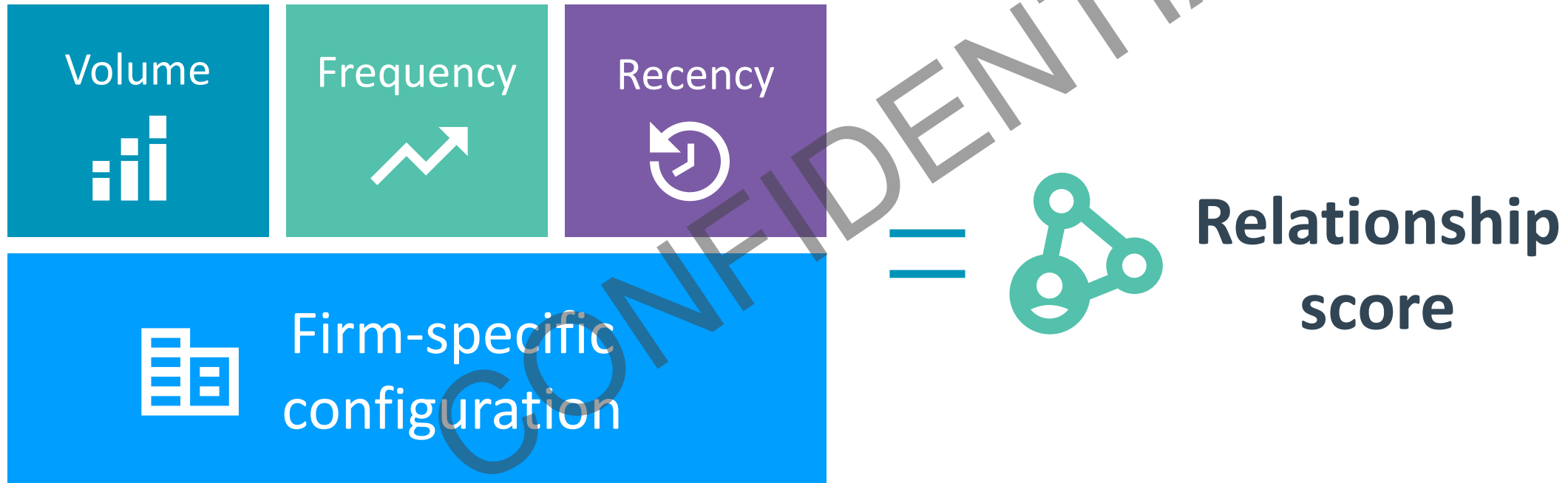
Colleague Relationships

Relationship Score ↓	Colleague	Contact	Last Qtr Trend
9.2 ██████████	Aubrey Gasbarre	Max Oliver	3%
8.3 ██████████	Conner Kipke	Carroll Lowe	13%
7.2 ██████████	Emanuel Mesa	Carroll Lowe	5%
6.1 ██████████	Michael Hoyt	Carroll Lowe	10%
6.1 ██████████	Michael Hoyt	Bennie Howell	2%
5.1 ██████████	Emanuel Mesa	Pete Garza	5%
4.6 ██████████	Betty Business	Pete Garza	10%
4.5 ██████████	Megan Harrison	Carroll Lowe	3%
3.8 ██████████	Kyra Olson	Max Oliver	-10%
3.5 ██████████	Dan Deals	Bennie Howell	-1%
3.1 ██████████	Aubrey Gasbarre	Carroll Lowe	-4%
2.7 ██████████	Betty Business	Carroll Lowe	-7%
2.1 ██████████	Carl Cloud	Pete Garza	5%
2.1 ██████████	McLain Robert	Max Oliver	-4%
1.7 ██████████	Aubrey Gasbarre	Pete Garza	-6%

Rows per page: 200

Scoring methodology

How unique relationship scores are generated:



Firm-specific configuration

Email and meetings

Consider:



Personal (1:1) vs. group



To, from, cc



10x last year vs. 2x this month







Required vs. optional attendee on invite

Firm-specific configuration

Marketing activities and events

Consider:

-  Do certain meeting types carry more weight than others?
-  What about marketing email activity?
-  What do you consider a high open rate?
-  Do some campaigns matter more than others?

Why a configurable algorithm matters:



Match your
firm's unique
communication style



Filter out junk
and irrelevant
communications



Build meaning
behind your
relationship scores

DealCloud DataCortex

Powering intelligence with trusted data sources

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Our data partners

Companies

Deals

People

News



DataCortex



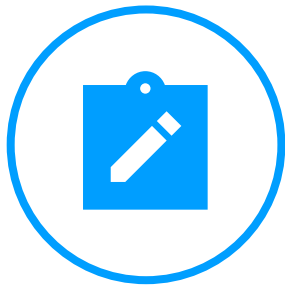
Business Development
Coverage
Networking
Data Management

Powered by:



DealCloud DataCortex

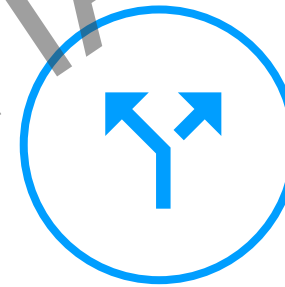
Augment proprietary datasets



**Minimized
data entry**



**Ongoing
automatic
enrichment**



**Flexibility
in setup**

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Let's see it in action!

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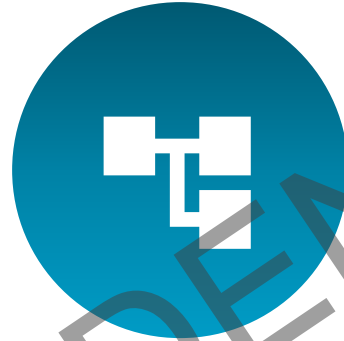
Key takeaways



Automate
data capture



Configure for
your firm



Augment with
third-party data



Visualize the
results



Act on the
insights

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Q&A

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Thank you

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