

# COMPONENTS OF 3E BUSINESS DEVELOPMENT



## INNOVATIVE SOLUTIONS FOR MORE THAN 70 YEARS

Whether you are part of a global institution, a multi-national firm, a boutique practice, a mid- or small-sized firm, a corporate legal department, or a government agency, Thomson Reuters Elite can provide you software products and services that help you broaden your strategic visibility over your business operations, simplify and boost firm-wide compliance, and confidently take on the future.

## ALL THE TOOLS YOU NEED

- **Enterprise Relationship Management** identifies the most important relationships
- **Customer Relationship Management** provides a view into your firm's relationship with each customer
- **Market and Competitive Intelligence** provides access to proprietary company, contact, and firm relationship data
- **Experience Management** leverages all of your firm's vital experience to win new business
- **Integrated Time and Billing** lets you leverage your firm's experience to identify opportunities
- **Lawyer Experience** provides access to contact and company information on the go\*
- **Marketing and Planning Automation** applies best-in-class techniques for successful planning, engagement, conversion, and measurement

FEATURES



WEBSITE



VIDEO



In today's fiercely competitive legal landscape, you need to work hard to keep the clients you have and even harder to win new ones. Having the right business development tools is imperative. 3E® Business Development is the only solution that supports the entire marketing campaign life cycle to help you plan successful campaigns, engage clients, convert opportunities, and measure results. Comprised of multiple applications, Business Development is a consolidated solution that helps unlock the power of information and drive successful business development initiatives. You can eliminate multiple solution providers that require point-to-point integrations. Business Development does it all in one single, dynamic combination. In short, it gives you all the tools you need to generate immediate ROI for your firm and help propel you ahead of the competition.



# COMPONENTS OF 3E BUSINESS DEVELOPMENT

## Enterprise Relationship Management

The 3E Business Development Data Engine automatically identifies, deduplicates, and classifies relationship data from multiple sources across your organisation without manual entry.

- Uncover new business opportunities from areas within your firm never touched before
- Identify the strongest and most important relationships to leverage across your business development initiatives
- Measure the relationship and contact strength
- Analyse relationship trends across geographies, practice areas, and industry groups through a combination of sophisticated search tools, relationship monitoring, and advanced reporting

## Customer Relationship Management

The Customer Relationship Management is a multifaceted platform where everything crucial to developing, improving, and retaining your customer relationships is stored. The Business Development ERM integrates with Microsoft® Dynamics® 365 CRM to automatically populate the CRM and ensure that it's always up to date.

- Centralise customer information
- Automate marketing interactions
- Provide business intelligence
- Facilitate communications
- Track sales opportunities
- Analyse data
- Enable responsive customer service

## Market and Competitive Intelligence

Analyse key client and industry trends and activities, gain competitive and market insight, and build key prospect lists.

- Access the Thomson Reuters company database, including business and financial data, corporate hierarchies, competitors, officers and directors, and more
- Access the Thomson Reuters professional database powering executive profiles for officers and directors and legal professionals including general counsel; view biographies, employment history, board memberships, and relationship paths via shared board memberships

## Experience Management

Store, manage, and use all of your firm's valuable experience data and lawyer CVs for business development initiatives.

- Generate an Experience record from a Matter record automatically and minimize data entry for shared data with the Experience from Matter workflow\*\*

\*Coming soon.

\*\*Available with Business Development in the Cloud only.

- Leverage experience data to inform pitches, website content, newsletters, and advertisements
- Pull talent and matter information to plan strategically
- Spend more time gaining strategic marketing and business development value from your experience management solution and less time managing data
- Manage internal approvals and publish experience for internal and external use

## Integrated Time and Billing

Leverage your entire firm's experience to easily identify powerful cross-selling and up-selling opportunities with the automatic population of your firm's experience into the CRM database.

- Access data pulled directly from 3E or Enterprise® to assess the work you've done by matter, client, or company
- Build client teams and identify experience to highlight in pitches, marketing communications, and on your firm website
- See the full picture of individual fee earners' experience and where their strongest relationships exist
- View how much business of each type and with each client your firm has conducted
- Easily evaluate client value for customer nurture programs

## Lawyer User Experience\*

Give your lawyers the information they need from anywhere with 3E Workspace. Available in iOS, Android, or on the web, Workspace ensures that your lawyers have the information that they need at their fingertips.

- Pull up real-time views into client data and relationship insight
- Update information and add people to marketing lists and activities anywhere, any time

## Marketing and Planning Automation

Drive value in your marketing campaigns with a rich feature set to manage the entire marketing life cycle, including planning, engagement, conversion, and measurement.

- Develop strong strategies based on clear insight, complete company and client data, and trend and competitive analysis
- Run marketing campaigns with confidence that your contact lists contain the most current data
- Deliver a framework for ROI analysis by planning marketing initiatives in a visual manner using hierarchical campaigns
- Leverage advanced reporting, custom views, and visual dashboards for rich robust insights that measure the effectiveness of your marketing and business development activities

To learn more about 3E Business Development, visit [elite.com/business-development](https://elite.com/business-development).

