

Customer Success: AM Law 200

Am Law 200 Firm Scales Proposal Delivery for Speed and Consistency

Key Highlights

- **Centralized Knowledge Base:** Eliminated fragmented spreadsheets by consolidating experience data and content into a single, searchable “source of truth.”
- **Accelerated Delivery:** Reduced time spent on manual assembly, allowing the team to produce high-quality first drafts and respond to tight litigation deadlines faster.
- **Seamless Collaboration:** Empowered real-time, cross-functional input—including independent use by Recruiting for attorney bios—without version control issues.

Overview

A nationally recognized U.S.-based Am Law 200 firm with more than 300 attorneys turned to QorusDocs to help drive proposal management efficiency and consistency. The company has a strong focus on litigation across industries including insurance, healthcare, financial services, and real estate. The firm's focus is on building long-term collaborative relationships, and it is ranked among the nation's most collaborative law firms.

With a centralized marketing and business development team supporting firm-wide pursuits, the pressure is constant. Every proposal must be accurate, tailored, and turned around quickly, often with input from multiple stakeholders.

The Challenge: When Growth Exposes Gaps

As the firm's proposal volume grew, the existing process began to show its limits.

Content and experience data lived in too many places: spreadsheets, documents, and internal systems that didn't always connect. While they had a strong proposal template, there was no consistent way to manage, surface, or reuse the firm's wealth of knowledge.

Teams often found themselves starting from scratch or relying on memory to track down the right materials. "There was no technology driving the collection of any of the experience. It was all in spreadsheets, making it a bit of a mess to find needed materials," recalls the Director of Marketing and Business Development.

A More Complex Type of Work

At the same time, the nature of proposals was shifting. Rather than panel submissions, more requests were tied to specific bits of litigation for existing clients. Each one required a tailored response, tighter turnaround times, and detailed input from attorneys. That level of customization raised the stakes. It also made an already manual process even more demanding.

Where Friction Showed Up

The challenges weren't always obvious at first, but they added up quickly. Experience data was fragmented across systems. Proposal assembly was time-consuming and highly manual. Formatting inconsistencies required careful review before anything could be sent. And much of the process depended on individual team knowledge rather than a shared, reliable content foundation.

As a result, valuable time was spent chasing information, reworking content, and double-checking details instead of focusing on strategy and differentiation.

Put simply, the team needed a better way to bring order and accessibility to their proposal content. All without slowing down an already fast-moving process.



"We had a strong template, but everything behind it was fragmented. A lot of our time was spent tracking down experience, piecing content together, and making sure everything was accurate before it went out the door."

Director of Marketing and Business Development

The Solution: Bringing Structure, Consistency, and Control to Proposals

The Am Law 200 firm turned to QorusDocs to bring structure and consistency to its proposal process. The initial implementation required time and effort, but it marked an important step forward. As the Director of Marketing and Business Development notes,

“Once we got it going, it was really great.” For the first time, the team had a platform designed to support how they actually worked.

Bringing Order to Content and Process

One of the biggest shifts was simply getting everything into one place. Experience data and proposal content, once spread across spreadsheets and internal systems, are now centralized and searchable. That alone has changed how the team approaches each new pursuit.

Instead of starting from scratch or tracking down materials, they can build from a structured foundation—pulling in relevant content, adapting it as needed, and focusing their time on shaping a strong, tailored response.

Making Collaboration Work in Practice

The platform has also made collaboration more practical. Team members can work together in real time, share input, and keep proposals moving forward without the usual back-and-forth delays. At the same time, built-in structure helps maintain consistency across documents, reducing the need for manual formatting fixes and last-minute checks.

The firm’s team made a conscious decision to fully commit to the platform. By putting in the effort to properly organize and maintain their experience data, they’ve created a system that continues to deliver value over time, rather than one that requires constant workarounds.



“We finally have everything in one place, which has made a huge difference. It’s easier to find what we need, easier to build from it, and much easier to keep everything consistent across proposals.”

Director of Marketing and Business Development

The Impact

The shift to QorusDocs has had a meaningful impact on both how the team works and how confident they feel in the output they're delivering.

- **Faster, More Efficient Proposal Delivery.**

The team is now able to turn around high-quality first drafts much more quickly. With a structured foundation in place, they spend less time assembling content and more time refining it. Even as proposal volumes remain steady, the process feels more manageable and far less reactive.

- **Stronger Content Management and Accessibility.**

Data is no longer buried in spreadsheets or scattered across multiple systems. Instead, it's organized, searchable, and easy to reuse. That shift alone has reduced the time spent hunting for information and made it far easier to build responses that are both relevant and well-supported.

- **Greater Consistency and Overall Quality.**

Previously, formatting inconsistencies and small content issues required careful manual review before anything could be sent out. Now, proposals come together in a more controlled environment, resulting in cleaner, more coherent documents with significantly less rework.

- **More Effective Team Collaboration.**

Collaboration has become more seamless and less dependent on back-and-forth emails or version control headaches. Team members can work together in real time, contribute where needed, and keep projects on track without unnecessary delays.

- **Greater Visibility into Proposal Activity.**

While the team isn't formally measured on win rates, proposal activity is closely tracked and shared at the highest levels of the firm. Each year, the team reports to shareholders on how many pitches and proposals were submitted, along with outcomes—wins, losses, and cancellations. As the senior executive explains, "we run the report every year for the shareholders," helping demonstrate the volume, consistency, and overall contribution of the team's work.

- **Value That Extends Beyond Proposals.**

The benefits haven't stopped with the Business Development team. Other groups across the firm, including Recruiting, are now using QorusDocs to generate polished attorney bios. What used to be a labor-intensive task is now handled quickly and independently. Our client jokes, "They don't even call us anymore! It just works nicely for us and keeps everything moving."

- **Greater Confidence in the Final Output.**

Perhaps the most important shift is the one that's hardest to quantify. The team now trusts the process. What once required constant checking, troubleshooting, and second-guessing has become a more reliable, repeatable way of working. That confidence shows up not just in speed, but in the overall quality of what goes out the door.



"It's not just that we're faster, it's that we're more confident in what we're producing. We know where our content is, we know it's accurate, and we can focus on delivering a stronger final product."

Director of Marketing and Business Development

Looking Ahead

While the firm has not yet fully adopted AI capabilities, the team is actively exploring how emerging features can further enhance efficiency. Particularly in areas like bid/no-bid decisions and content automation.

With a strong foundation now in place, they are well positioned to take advantage of the next phase of innovation.



QorusDocs is an automated Value and Proposal Management platform that unites value management with proposal automation. Built for professional services, legal, technology services, and AEC organizations, the platform supports intelligent business cases and personalized, data-driven pitches, presentations, proposals, and RFP responses. Trusted by 200+ organizations, QorusDocs helps firms prove ROI, optimize billable hours, and win more business. The company operates globally, with offices in Bellevue, Washington, London, England, and Cape Town, South Africa.

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