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Data That Moves:

From Passive Info to Predictive Power

A Practical White Paper for CMOs and BD Leaders

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Executive Summary

Professional services firms hold vast amounts of client and market data, yet too often this asset is underleveraged. Poor CRM adoption, fragmented systems, and unclear ownership mean valuable intelligence sits unused. At the same time, client expectations are rising, competition is intensifying, and predictive analytics is no longer a distant future – it is a present-day differentiator.

Layered on top of this is the increasing pressure on firms to deliver growth in highly competitive markets, making the effective use of data not just a nice-to-have but a business imperative.

This white paper explores how firms can move beyond passive information and embed data-driven growth into their business development and marketing functions. It examines where firms typically fall short, what practical steps leaders can take to motivate teams and improve data quality, and how to progress from basic reporting to forward-looking predictive insight.

Key insights you'll gain:

- Why many firms remain stuck at the reporting stage – and how to move towards predictive intelligence.

- What motivates professionals to share and maintain quality data – and what barriers block adoption.

- The role BD and marketing leaders must play to embed cultural change and make data a true growth asset.

- Practical tools – from self-assessment frameworks to action plans – that CMOs can use immediately.

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Introduction:

From Information to Intelligence

Data is often described as the new oil. Yet inside many firms, it is more like untapped reserves – abundant but inaccessible. Client and market insights exist in CRMs, spreadsheets, email inboxes, personal networks, and online sources such as LinkedIn, industry databases, and company websites, but are rarely consolidated or harnessed to drive growth.

The reality is that operational systems were built to run the business, not to grow it. Practice Management Systems excel at billing and compliance. Document Management Systems keep matters organised. But growth depends on something else – accurate, accessible, and forward-looking data that helps professionals understand where opportunities lie and how best to act on them.

> *Recent discussions at the "Data That Moves" workshop highlighted that while firms often trust their financial data for invoicing, inconsistencies such as multiple client IDs or naming conventions make it unreliable for broader business development analysis. This shows why even seemingly 'accurate' data can undermine growth if not structured consistently.*

The challenge is cultural as much as technical. Without motivation, ownership, and integration into daily behaviours, even the most advanced systems remain underused. The opportunity lies in shifting from passive data collection to predictive power – embedding intelligence that guides the next best move.

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Where Firms Stand Today:
A Data Health Check

Most firms believe they could be doing more with their data. Yet adoption and quality lag for common reasons:

- **Fragmented systems** – Client information often lives in multiple places: CRM, practice management systems (PMS), email inboxes, spreadsheets, and even individual hard drives. Without a central source of truth, firms struggle to get a complete picture of client relationships, duplication occurs, and valuable insights are lost in silos.

- **Low adoption** – Even when systems are in place, many partners and professionals are reluctant to update them. If they cannot see the immediate benefit, the effort feels like an administrative burden. As a result, data quickly becomes incomplete or outdated, undermining its reliability and usefulness across the firm.

- **Limited analytics** – Too often, firms rely on static, backward-looking reports. These can summarise what has happened but do little to predict future opportunities or risks. Without forward-looking analytics, firms miss the chance to anticipate client needs, identify cross-selling opportunities, or act early on market trends.

- **Lack of ownership** – Responsibility for data management is often unclear. With no single owner, standards differ across teams, and accountability falls through the cracks. This inconsistency weakens trust in the data, creating a cycle where people are even less inclined to use or contribute to it.

- **Lack of perceived value** – Perhaps most importantly, many partners do not see a clear value exchange in providing information. They often feel that entering data into systems does not directly benefit their practice. In particular, there is scepticism about how their input supports marketing and business development, which can make engagement even harder to secure.

The scale of the challenge is stark. A recent industry report found that more than 80% of law firms have a CRM solution, but only 20% rate their CRM as effective across critical marketing and BD functions – fewer than 4 out of 10 lawyers use CRM at all, and only a quarter of those use it regularly for pipeline management (LegalSales, 2023).

A self-assessment across five categories – CRM adoption, marketing technology, data quality, integration, and reporting – often reveals that most firms are operating at a basic maturity level. Few move beyond descriptive insights to predictive or prescriptive intelligence. At the same time, many firms are trying to modernise by forcing CRM platforms to do things they were never designed for. Data is pumped into tools like Salesforce or Spector but then constrained within the application's structure. Instead of seeing the full client story, firms are left with summarised, surface-level information that limits what can be achieved.

One approach raised at the event was the concept of a "data fabric" – a unified data model tailored to a firm's growth strategy. Unlike generic warehouses, a data fabric brings together both client-facing insights and revenue analysis to enable 'actionable intelligence' rather than just static reporting. The consequence is clear: missed opportunities to cross-sell, weaker client engagement, and a failure to embed growth into the daily rhythm of the firm.

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Motivating Teams:
Overcoming Barriers to Adoption

Motivators

- **Seeing immediate personal benefit –** Partners are far more likely to contribute when they can clearly see how it helps them. For example, better visibility of their own clients, active opportunities, or incoming referrals creates a direct connection between data entry and outcomes that matter to them.

- **Reduced admin through automation –** When data capture is automated through tools like email and calendar sync or activity tracking, the burden on individuals drops significantly. This not only improves adoption but also ensures information is more accurate and timely, without relying on people to remember to update systems manually.

- **Recognition and reward for maintaining high-quality data –** Publicly acknowledging individuals or teams who maintain complete, accurate data reinforces its importance. Linking recognition to tangible incentives or career progression signals that data quality is not just an admin task but a valued contribution to the firm's success.

- **A clear link between data quality and business outcomes –** People are motivated when they understand the "so what." Showing how accurate data leads to better decision-making, stronger pursuit strategies, or improved client retention creates a clear rationale for why it matters.

- **Tangible client and revenue value –** Ultimately, partners want to know how their input moves the needle commercially. Demonstrating how better data directly supports winning new work, strengthening client relationships, and driving revenue growth turns data quality from a compliance exercise into a competitive advantage.

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Motivating Teams:

Overcoming Barriers to Adoption

Barriers

- **Lack of time – data entry seen as an extra task**
  In busy professional services environments, fee-earners prioritise client work and billable hours. Data entry is often perceived as a low-value, time-consuming chore that takes them away from client delivery. Without clear benefits or streamlined processes, it becomes the first thing to drop off the to-do list.

- **No accountability or leadership modelling behaviour**
  If senior partners and leaders are not visibly using or updating systems, others quickly follow suit. Without accountability or role modelling at the top, data management is seen as optional rather than essential. This undermines adoption and creates an inconsistent culture around data quality. The Toronto case study shared during the workshop showed how a firm invested heavily in a premium CRM, only to see it fail due to poor cultural alignment. The lesson: technology-first rollouts without addressing process and behaviour rarely succeed.

- **Cultural resistance to sharing client information**
  In many firms, client relationships are viewed as personal assets. This "my client" mindset fosters a reluctance to share information across teams or practices, leading to silos. The fear of losing control or credit discourages open collaboration, even though shared client data is critical for cross-selling and coordinated business development.

Systems perceived as clunky or irrelevant to day-to-day practice. LexisNexis highlights "user interface complexity … steep learning curves can discourage consistent use" (LexisNexis, 2024).

Access to information itself is often the first barrier. Simply getting hold of the right data can be difficult, and when it is available, it is frequently hard to consume. Information is either locked inside a CRM or filtered through dashboards and reports that do not align with how partners naturally consume insights. Against this backdrop, firms that succeed are the ones that create an environment where updating data feels natural, easy, and beneficial. As JD Supra noted, "Firm-wide CRM adoption requires more than just a great tool; it needs commitment from leadership. Firm leaders set the tone for how technology is used and embraced" (ClientFirst Consulting, 2025).

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From Reporting to Predictive Insights

Most firms sit at the descriptive level – "What happened?" A smaller number progress to diagnostic – "Why did it happen?" Few reach predictive or prescriptive – "What will happen next?" and "What should we do about it?" The journey requires both better systems and a shift in mindset.

Predictive insights are not about more data; they are about better use of existing data. Firms do not have to start by chasing more data. While expanding data sources can add value, the real opportunity lies in making better use of what is already available. Examples of predictive power include:

- Identifying clients at risk of attrition based on engagement signals.
- Forecasting which opportunities have the highest probability of conversion.
- Mapping cross-practice referral potential across key accounts.
- Using market signals to prioritise where BD teams spend their energy.

> *Speakers at the workshop emphasised that firms should not wait for perfect data before moving forward. Even with incomplete information, applying human oversight can create immediate value – a principle described as achieving "directional accuracy." For example, financial data is inherently solid and can be used right away for trend analysis and opportunity spotting. The trend is already here. PwC's Law Firm Survey shows that firms are "investing significantly in data strategy, with an average expected spend of 1.6% of revenue over the next three years" (PwC, 2024).*

The Role of BD and Marketing Leaders

Firms cannot expect partners alone to change behaviours. BD and marketing leaders must own the role of data enablers – ensuring quality, driving adoption, and translating insight into action. Their responsibilities include:

- Setting data standards and accountability frameworks.
- Providing practical tools that simplify adoption.
- Acting as connectors between marketing, BD, and fee earners.
- Coaching professionals on how to act on insights, not just review them.
- Embedding data into core rhythms – pipeline reviews, client planning, pursuit strategies.

As Lawyer Monthly notes, "Provide comprehensive training and support … ongoing assistance such as troubleshooting … is vital for long-term adoption" (Lawyer Monthly, 2024).

When BD and marketing take ownership, they move data from being a static resource to a living growth asset.

> *The recent workshop stressed that this shift also depends on a shared taxonomy across all firm functions. When intake, finance, marketing, and experience data use the same definitions, BD and marketing leaders can truly 'join the dots' and translate data into growth opportunities.*

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Action Planning:
Turning Insight into Action

From Passive to Predictive

For many firms, the leap from theory to practice is the hardest step. Embedding small, achievable actions makes the difference. A simple framework asks each leader to identify:

- Quick win – an action to take this week (e.g. update top 10 client records).
- Medium-term goal – an initiative for the next six months (e.g. integrate email capture into CRM).
- Key conversation – a discussion with leadership or peers to align on priorities.

When firms combine structured planning with cultural reinforcement, they begin to see momentum – cleaner data, more engaged teams, and insights that genuinely shape BD strategy.

> *Workshop attendees were encouraged to complete a "Data Maturity Assessment" as a practical next step. This self-assessment helps firms benchmark their current state, assign process owners, and set realistic 30- and 90-day actions – ensuring the shift from theory to action is tangible.*

Data without action is noise. Firms that rely only on basic reporting will fall behind competitors who use predictive intelligence to focus resources where they matter most. The pathway to predictive power does not start with technology alone – it starts with leadership, culture, and a commitment to embed data into daily practice.

For CMOs and BD leaders, the mandate is clear: take ownership, motivate teams, and connect data to growth outcomes. The firms that succeed will not just report on yesterday – they will know where to focus tomorrow.

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