



Customer Success

How an Am Law 100 Firm Turned Proposal Management into a Strategic Advantage



Overview

A large, full-service Am Law firm with more than 1,000 attorneys globally manages a high volume of proposals across a wide range of practices and client needs. To support that scale, the firm adopted QorusDocs several years ago to centralize knowledge, streamline workflows, and improve the quality and consistency of proposal responses.

Over time, deeper CRM integration and AI capabilities have allowed the firm to further mature its approach, evolving from efficient execution toward a more connected, insight-driven proposal process that supports both speed and strategic focus.

Key Highlights

Faster Turnaround Times

Compressed proposal timelines from days to hours by combining AI capabilities with deeply integrated workflows.

Stronger Proposal Quality

Delivered higher-quality first drafts with significantly less attorney redlining, improving confidence, collaboration, and consistency.

Clear Visibility into Business Impact

Connected proposal activity to outcomes, making data actionable and attributable to better evaluate and strategically pursue future opportunities.

The Challenge: Meeting Growing Demand with Strategic Intent

As the firm grew, proposal demand increased alongside client expectations. While the business development team had established strong foundational processes, content sprawl, manual steps, and disconnected systems made it difficult to scale efficiently without increasing review burden on attorneys or business development resources.

When Content Lives Everywhere, and Nowhere

Before implementing QorusDocs, proposal development relied heavily on shared document systems and individual knowledge. Content was difficult to find, reuse, and trust.

“There was no reliable way to find what you needed,” recalled a business development leader. “You either remembered working on something years ago or recreated it from scratch. The process leaned heavily on institutional knowledge that couldn’t easily be shared.”

Search results were broad and unfocused, leading teams to recreate content rather than reuse it, driving inefficiency and inconsistency.

The Reality of “Frankenstein” Proposals

Drafting proposals was fragmented and time-consuming. Content was often stitched together from multiple sources, resulting in inconsistent tone, formatting issues, and uncertainty around version control.

“You never knew if you were working with the most current version, and it looked like it was written by several different people – because it was.”

Too much time was spent assembling and fixing documents rather than refining strategy or client messaging.

Volume Was Rising. Capacity Was Not.

The firm managed hundreds of pursuits annually, many tied to formal RFPs and RFIs. As volume increased, the goal was not to generate more proposals, but to deliver higher-quality submissions more efficiently without increasing attorney non-billable time.

Insight Was the Missing Piece

Proposal activity, client intelligence, and outcome data lived in separate systems. Without integrated workflows, it was difficult to evaluate performance holistically or identify patterns that could inform better pursuit decisions.

The Solution: From Disconnected Tools to Intelligent, Integrated Workflows

The firm implemented QorusDocs to centralize content and standardize proposal workflows, focusing on practical use cases that supported scale, consistency, and adoption. Integration with the firm’s CRM became a critical component of that evolution.

Integration That Drives Efficiency and Adoption

CRM integration reduced task switching and created a seamless end-to-end workflow. Instead of moving between systems to gather client intelligence, confirm opportunity details, and track outcomes, business development professionals could work within a single environment.

This allowed tracking, content generation, editing, client intelligence review, and strategic messaging refinement to happen in one place. Removing friction between systems is where the most significant time savings emerged and where adoption increased most meaningfully.

Moving Beyond Static Content

AI capabilities further enhanced an already mature proposal process. Rather than replacing established training or workflows, AI accelerated how experienced team members worked.

Drafting and tailoring responses using prior proposals, firm experience, and client context surfaced through integrated systems dramatically reduced manual effort. What once required extensive searching and rewriting could now be handled quickly and seamlessly within the proposal environment.

AI allowed the team to spend less time on mechanics and more time on judgment, quality, and strategic positioning.

Personalization at Scale

With strong foundational processes in place, AI and integration made it easier to consistently personalize proposals at scale.

Rather than relying on generic firm overviews, submissions were shaped around client priorities, informed by relevant experience and opportunity context readily available within the workflow.

“The goal is to build proposals around what actually matters to the client,” explained the business development leader, “not just assemble content efficiently.”

The Impact

Faster Turnaround, Less Friction

Highly tailored responses that once took days can now be completed in a fraction of the time. In one instance, a stalled response was completed in under half an hour by leveraging integrated data and AI-assisted drafting.

The team can respond faster without sacrificing quality or increasing strain on attorneys.

Higher-Quality First Drafts

First drafts now land much closer to expectations, resulting in fewer attorney revisions and less back-and-forth late in the process. This reduced non-billable review time and shifted how the business development team contributes to pursuits.

Rather than functioning as late-stage copyeditors, the team is increasingly engaged earlier in shaping strategy, messaging, and positioning. This has strengthened collaboration with attorneys and reinforced the business development function's role as a strategic advisor focused on quality, differentiation, and client impact.

Clear, Actionable Performance Insights

By linking proposal activity to CRM data, leadership can analyze win rates, new matters, and trends across practices and opportunity types.

The result is data that is not just visible, but actionable and attributable, supporting more informed decisions about where and how to pursue future opportunities.

A Shift Toward Proactive Growth

Together, these improvements support a more intentional, proactive approach to business development. Faster turnaround, deeper personalization, and connected insights enable the firm to compete more effectively while elevating both the quality of proposals and the strategic role of the business development team.

Ready to Win More Proposals with AI?

Book a quick, personalized demo to see how QorusDocs helps your team respond faster and win more business.

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