



## Partner Talk #3: Building the Bifröst: New DEI Content Strategies for Pitches and Proposals



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# **Building the Bifröst: New DEI Content Strategies for Pitches and Proposals**

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# Agenda

Amid the legal profession's push for greater diversity, equity, and inclusion ("DE&I")—and whether in both anticipation of or response to client demand, leading firms are incorporating compelling DE&I-focused content into their business development processes. This presentation offers a compelling real-world case study on how to differentiate your pitches and proposals through valuable and relevant data points. Participants will discover innovative strategies and best practices for winning work and creating dashboards that show firmwide progress on key DE&I objectives

- The story of DE&I in pitches and proposals
- A strategy for positioning your firm
- What really matters...
- Where does the data come from?

# DE&I Qualifies and Differentiates

## Current Situation

Clients are requiring firms to structure their teams in a manner that is respectful and considers diversification an important quality of a successful team. These requirements place the responsibility of team diversity on the firm and impacts a prospects decision making process. In addition, there is a significant rise in ad-hoc requests from clients that are outside the business development workflow

# DE&I Qualifies and Differentiates

## The Impact

Firms are struggling to collect the data and quickly respond to these requests. Firms are required to propose teams that meet the diversity requirements of their clients and collecting this information in a timely manner is often difficult and always out of date

# Strategies for presenting your firm

How to approach presenting your firms DE&I facts

**What is your strategy for presenting  
DE&I in pitches and proposals?**

# **Speak to your reality**

**Format must reflect your true reality... honesty is key**

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# **Speak to your strengths**

**We're strong at recruiting... professional  
development... we have a strategy**

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# **Speak to your commitment**

**We're strong at recruiting... professional  
development... we have a strategy**

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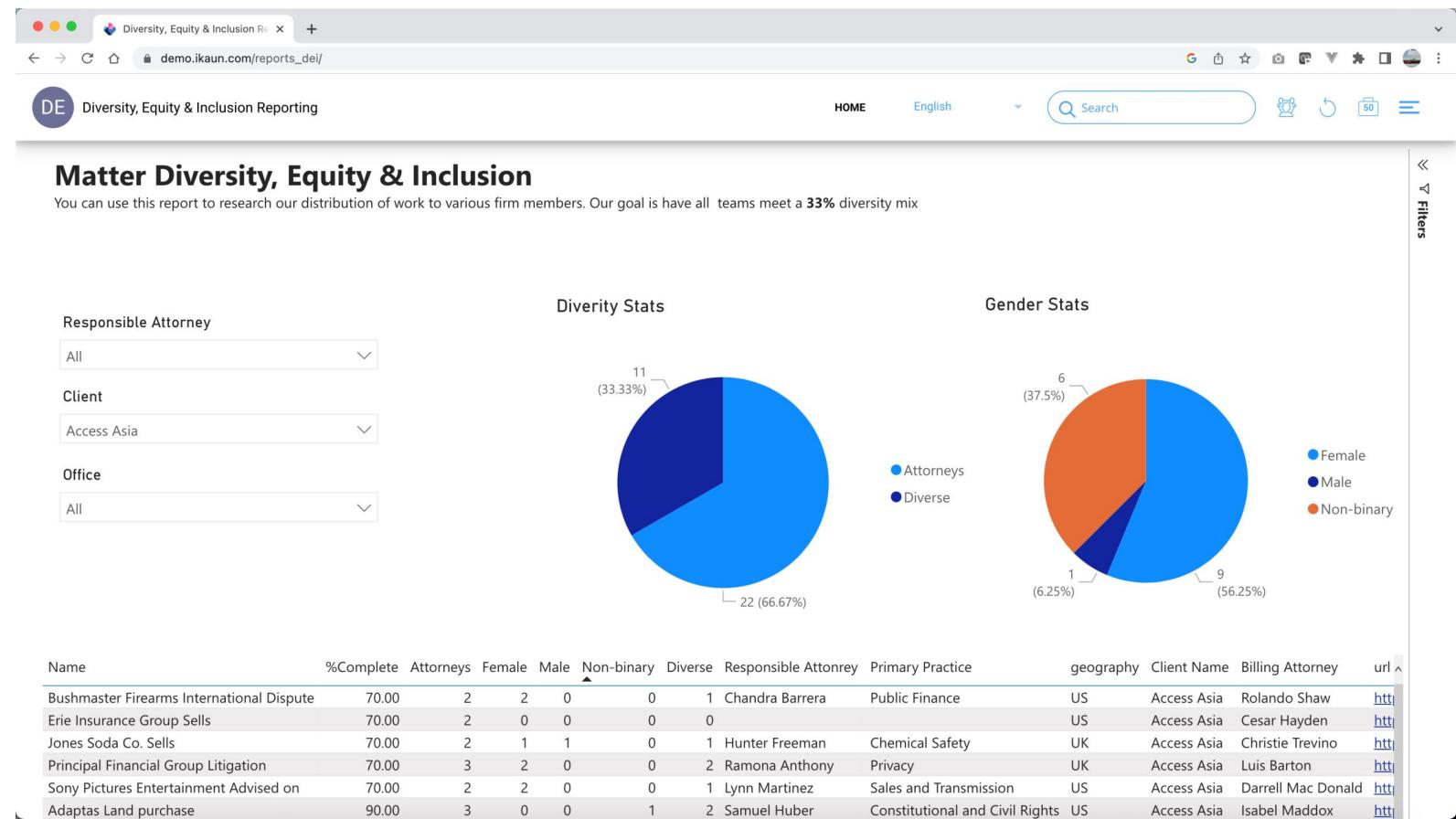
# **What is being requested? Is it just pitches and proposals?**

- Counts and Percentages(Gender, Diversity, Sexual Orientation, Veterans)
- Committee Leadership Roles
- Opportunities for promotion and advancement
- Percentage of women considered for promotions
- What is your committee participation

# Where do you get this data?

- HRIS System?
- Excel?
- Email?

# DE&I Reporting based on experience data



## Matter Diversity, Equity & Inclusion

You can use this report to research our distribution of work to various firm members. Our goal is have all teams meet a **33%** diversity mix

Responsible Attorney

All

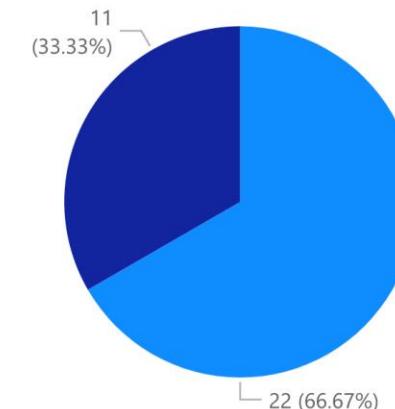
Client

Access Asia

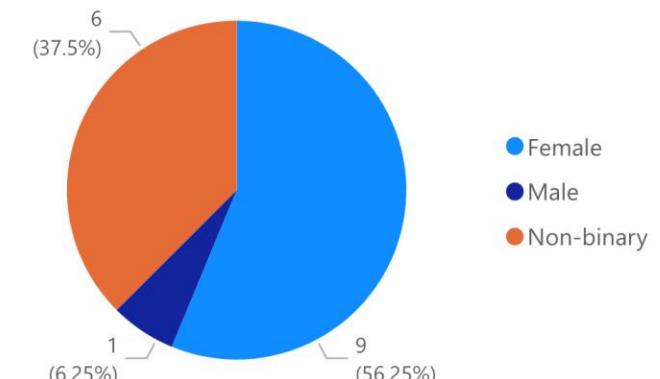
Office

All

### Diversity Stats



### Gender Stats



Name	%Complete	Attorneys	Female	Male	Non-binary	Diverse	Responsible Attorney	Primary Practice	geography	Client Name	Billing Attorney	url
Bushmaster Firearms International Dispute	70.00	2	2	0	0	1	Chandra Barrera	Public Finance	US	Access Asia	Rolando Shaw	<a href="#">http://</a>
Erie Insurance Group Sells	70.00	2	0	0	0	0			US	Access Asia	Cesar Hayden	<a href="#">http://</a>
Jones Soda Co. Sells	70.00	2	1	1	0	1	Hunter Freeman	Chemical Safety	UK	Access Asia	Christie Trevino	<a href="#">http://</a>
Principal Financial Group Litigation	70.00	3	2	0	0	2	Ramona Anthony	Privacy	UK	Access Asia	Luis Barton	<a href="#">http://</a>
Sony Pictures Entertainment Advised on	70.00	2	2	0	0	1	Lynn Martinez	Sales and Transmission	US	Access Asia	Darrell Mac Donald	<a href="#">http://</a>
Adaptas Land purchase	90.00	3	0	0	1	2	Samuel Huber	Constitutional and Civil Rights	US	Access Asia	Isabel Maddox	<a href="#">http://</a>

## **Pitch - Diversity, Equity, and Inclusion**

You can use this report to research our distribution of work to various firm members. Our goal is have all Proposed teams meet a **33%** diversity mix

### Lead Attorney

All

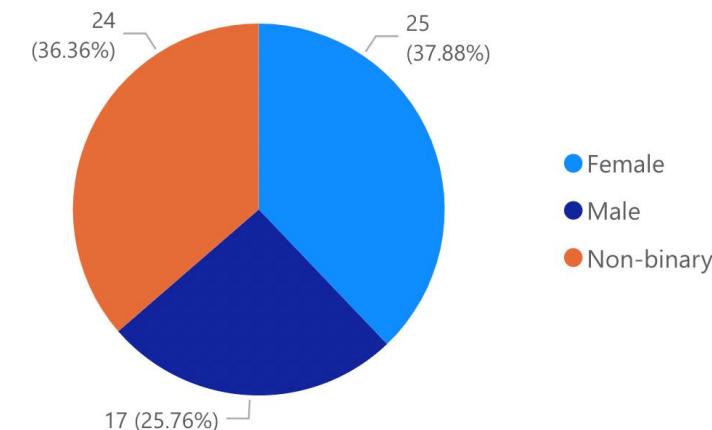
Lead

Client Name

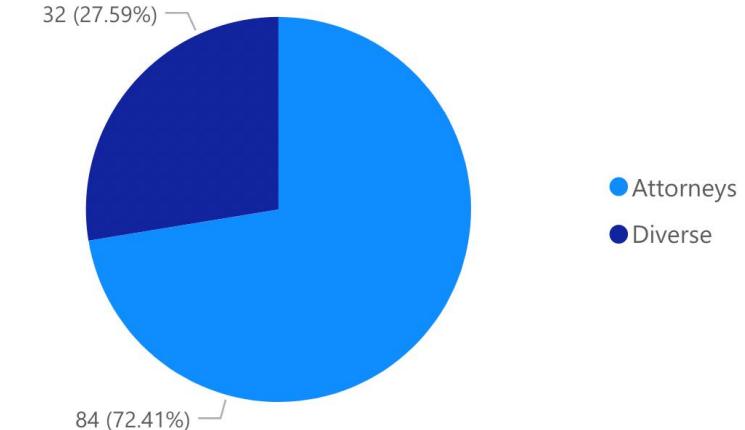
## Outcome

## Area of law

## Gende



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Name	Client	Area of Law	Geo	Lead	Lead Attorney	Outcome	Url
Jimmy John's - Proposal	Textron Inc.	Individual	UK	Betty Cline	Betty Cline	Win	<a href="https://demo.ikaun.com/-/profile">https://demo.ikaun.com/-/profile</a>
Fiserv - Proposal	Rent-A-Wreck	Privacy	US	Yesenia Bray	Yesenia Bray	Win	<a href="https://demo.ikaun.com/-/profile">https://demo.ikaun.com/-/profile</a>
Circuit Design - Proposal	Rent-A-Wreck	Probate	US	Yesenia Bray	Yesenia Bray	Win	<a href="https://demo.ikaun.com/-/profile">https://demo.ikaun.com/-/profile</a>
O'Reilly - Proposal	Rent-A-Wreck	Probate	US	Yesenia Bray	Yesenia Bray	Win	<a href="https://demo.ikaun.com/-/profile">https://demo.ikaun.com/-/profile</a>
Netaid - Proposal	Rent-A-Wreck	Probate	US	Yesenia Bray	Yesenia Bray	Win	<a href="https://demo.ikaun.com/-/profile">https://demo.ikaun.com/-/profile</a>

# Summary

Amid the legal profession's push for greater diversity, equity, and inclusion ("DE&I")—and whether in both anticipation of or response to client demand, leading firms are incorporating compelling DE&I-focused content into their business development processes. This presentation offers a compelling real-world case study on how to differentiate your pitches and proposals through valuable and relevant data points. Participants will discover innovative strategies and best practices for winning work and creating dashboards that show firmwide progress on key DE&I objectives

- Speak to your reality
- Speak to your strengths
- Speak to your commitment
- Be ready with the most commonly requested stats... but these seem to change daily😊