

# VENDOR ADVISORY AND CONSULTING

## Detailed Service Offering by Business Function

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Legaltech Hub offers a range of services designed to support the successful operation of legal tech product and service companies. While this list is not exhaustive, it highlights the key areas of expertise we provide, from strategic planning to sales, marketing, operations, and more.

### SERVICE OFFERINGS

#### Business Strategy

Our Business Strategy offering helps you develop long-term plans, define your market position, grow your business, and optimize your organization for efficiency and success.

- **Strategic Planning:** Develop long-term plans that align with market opportunities and company goals.
- **Market Positioning:** Define competitive advantages and unique value propositions to stand out.
- **Growth Strategy:** Advise on scaling, market expansion, and M&A strategies.
- **Organizational Design:** Structure the organization to support strategic goals and operational efficiency.
- **Vision & Mission Development:** Help refine aspirational and achievable vision and mission statements.
- **Operational Efficiency:** Identify inefficiencies and recommend process improvements and technology adoption.

#### Corporate Strategy

Our Corporate Strategy services guide you in diversifying revenue streams, managing investor relations, expanding into new markets, navigating mergers and acquisitions, and structuring your business for optimal returns on exit.

- **New Business Models:** Advise on creating new revenue streams to diversify and future-proof the business.
- **Investor Relations:** Guide effective communication with investors and stakeholders on strategy and performance.

- **Market Expansion:** Develop strategies for entering new markets, verticals, or customer segments.
- **M&A Strategy:** Advise on identifying acquisition targets, conducting due diligence, and ensuring smooth integration.
- **Board Governance:** Implement best practices for board governance, accountability, and performance.
- **Corporate Structure for Exit:** Advise on structuring the business to maximize returns on exit, including leveraging opportunities like Qualified Small Business Stock (QSBS) for tax advantages.

## Fundraising

Our Fundraising services provide guidance on raising capital, creating compelling investor materials, managing investor relations, and ensuring accurate business valuations for acquisitions or sales.

- **Fundraising Strategy:** Advise on raising capital through equity, debt, or venture capital.
- **Investor Relations & Pitch Decks:** Create pitch decks, financial projections, and messaging for investor meetings.
- **Valuation Services:** Advise on potential business valuations for acquisitions or sales based on current market trends.

## Product

Our Product offering helps you identify and analyze market trends, position your product strategically, prioritize key features, and decide which integrations are most valuable to your product strategy.

- **Market Trend Analysis:** Provide insights into legal tech trends and their impact on your product strategy.
- **Competitive Analysis:** Identify market gaps and opportunities through competitor evaluation.
- **Strategic Positioning:** Ensure your product addresses key legal needs and stands out in the market.
- **Long-Term Product Vision:** Align your product roadmap with legal-specific goals and business objectives.
- **Product-Market Fit:** Refine your product to better meet the needs of legal buyers.
- **MVP Development:** Define the core features that matter most to legal professionals.
- **Feature Prioritization:** Organize features based on market demand and legal workflow impact.

- Integrations Strategy: Identify and prioritize integrations with other legal tech solutions for added value.

## Sales

Our Sales offerings help guide you in building go-to-market strategies, optimizing your sales funnel, managing client relationships, and expanding your market presence through strategic partnerships.

- Go-to-Market Strategy: Develop a plan to penetrate new legal markets with targeted messaging.
- Sales Plan Creation: Build a sales plan aligned with revenue goals, including quotas and territories.
- Pricing Strategy: Optimize pricing models and packaging to match market expectations.
- Sales Funnel Optimization: Streamline lead generation, deal closure, and handoffs between teams.
- CRM Setup & Optimization: Implement and optimize CRM systems to manage legal client data.
- Sales Automation: Introduce automation for follow-ups, email sequences, and reporting.
- Account Management: Create strategies for growing and retaining key legal clients.
- Customer Success Integration: Ensure seamless transitions from sales to customer success.
- Partnership Strategy: Build sales through partnerships and strategic alliances.
- Channel Sales Optimization: Manage and optimize partner sales efforts with training and incentives.
- Sales Expansion Strategy: Enter new markets, scale teams, and increase revenue via upselling and cross-selling.

## Marketing

Our Marketing services help you develop comprehensive marketing strategies, create targeted content, launch products, and leverage marketing tools to drive growth and brand engagement.

- Comprehensive Marketing Strategy: Develop a marketing plan aligned with business goals and competitive positioning.
- Go-to-Market Strategy: Create GTM strategies for new legal products or services.
- Content Strategy: Plan content like blogs, case studies, and webinars tailored to buyer journeys.

- **Social Media Strategy:** Design social campaigns across LinkedIn, X, and other platforms for brand engagement.
- **Email Marketing:** Develop segmented, automated email campaigns to nurture leads.
- **Inbound Marketing:** Drive lead generation through content, SEO, and social media engagement.
- **CRM Implementation & Optimization:** Set up and optimize CRM systems like HubSpot to track leads, automate workflows, and measure marketing performance.
- **Analytics & Reporting:** Set up tools to measure performance, conversions, and ROI.
- **Product Launch Planning:** Plan and execute successful product launches with targeted messaging.
- **Value Proposition & Messaging:** Define clear value propositions that highlight product benefits.
- **Event Marketing:** Promote webinars, conferences, and workshops to build awareness and generate leads.
- **Channel Marketing:** Create co-marketing strategies with partners to expand reach.
- **Marketing Tech Stack Audit:** Review and recommend marketing tools to optimize performance.
- **Marketing Automation:** Implement automation tools to streamline marketing workflows.

## **Customer Support/ Success**

Our Customer Support and Success services help you design support strategies, build efficient teams, map customer journeys, and implement systems to ensure customer satisfaction and retention.

- **Support Strategy Design:** Create a customer support strategy aligned with business goals for satisfaction and retention.
- **Team Structure & Roles:** Build and scale support teams, defining roles like frontline, technical, and account management.
- **Customer Journey Mapping:** Analyze support touchpoints to enhance the overall customer experience.
- **Service Level Agreements (SLAs):** Define and implement SLAs to set clear service expectations and standards.
- **Helpdesk & Ticketing System Setup:** Implement helpdesk systems like Zendesk or Freshdesk to streamline support operations.

## **CFO & Controller Services (Fractional CFO)**

Our Fractional CFO offering helps you manage financial operations, provide strategic financial leadership, and optimize cash flow to support your business's growth and stability.

- Interim or Fractional CFO: Provide part-time or interim CFO support for financial leadership without full-time commitment.
- Financial Operations Management: Oversee payroll, accounts receivable/payable, and cash flow management.
- Financial Leadership Coaching: Coach financial leaders on best practices, compliance, and strategic decisions.

## **Operations**

Our Operations services help you develop operational strategies, optimize processes, manage projects effectively, and identify cost-saving opportunities to enhance efficiency.

- Operations Strategy: Develop long-term operational strategies aligned with business goals.
- Process Optimization: Redesign business processes to improve productivity and efficiency.
- Project Management Consulting: Implement project management frameworks like Agile or Waterfall to enhance delivery and resource management.
- Operational Audits: Conduct audits to identify inefficiencies and recommend improvements.
- Cost Reduction & Efficiency: Identify cost-saving opportunities while maintaining service levels.
- Workforce Planning: Optimize workforce structure and resource allocation for operational needs.
- Outsourcing Strategy: Advise on outsourcing, including vendor selection and contract management.

## **Privacy & Security**

Our Privacy and Security services help you ensure regulatory compliance, develop security policies, protect data, and prepare for certifications like SOC2 and ISO 27001.

- Regulatory Compliance Strategy: Ensure compliance with GDPR, HIPAA, SOC2, and other regulations.
- Policy Development: Create and implement compliance policies aligned with industry standards.

- Training Programs: Develop employee training on compliance, ethics, and data protection.
- Security & Compliance Consulting: Integrate security measures and compliance into product development.
- Data Privacy Strategy: Build privacy strategies that meet GDPR, CCPA, and global privacy laws.
- Information Security Program: Develop or enhance security programs aligned with ISO 27001, NIST, or SOC2.
- SOC2/ISO 27001 Readiness: Guide preparation and certification for SOC2 and ISO 27001.
- Security Policy Creation: Develop security policies to protect data and meet regulatory standards.
- Audit Preparation: Support audit readiness with documentation and process organization.
- Privacy by Design: Embed privacy into products and services from the start to ensure compliance.

## DELIVERY OPTIONS

We deliver the services above through two distinct approaches: Advisory and Consulting engagements. Each is tailored to meet the unique needs of your business. Advisory engagements focus on providing strategic insights, mentorship, and guidance, leaving the day-to-day implementation to your team. Consulting engagements, on the other hand, offer more comprehensive support, including hands-on assistance with executing your strategies and plans.

### Advisory

Our Advisory Services are designed to provide you with the insights, mentorship, and strategic guidance necessary to navigate this complex market. By leveraging our deep industry knowledge, we help you unlock new growth opportunities, streamline your operations, and achieve long-term success. Through a collaborative approach, we tailor our services to align with your company's evolving needs, ensuring that you receive the most relevant and impactful support throughout our engagement.

These services are designed to offer strategic guidance, not to produce ongoing, detailed work products. We focus on providing advice and coaching, while the implementation of your strategy, product development, or operational changes remains the responsibility of your team. We're here to guide and support, but the day-to-day work is up to you.

### **A typical engagement:**

- Provides for between 1 hour and 4 hours of engagement per month
- With one or more of our experts
- Over a 3- to 6-month term
- Under a fixed fee agreement.

## Fractional Support

Our Fractional Support Services provide you with regular, committed time from a Legaltech Hub expert to enhance your business operations on an ongoing basis. This model is ideal for companies that need senior-level expertise but may not require a full-time executive. Whether it's bringing in a Fractional CMO for one day per week to build and implement a comprehensive marketing strategy, or a Fractional COO to oversee key operational improvements, our experts integrate seamlessly into your existing team and focus on driving strategic initiatives.

These engagements are designed to deliver consistent, hands-on involvement while remaining flexible and cost-effective. By leveraging our deep industry knowledge and leadership experience, we provide the expertise your company needs to grow and scale, without the long-term commitment of a full-time hire. Fractional Support services help ensure that critical functions—such as marketing, operations, or financial leadership—are addressed with the same level of attention and precision that you'd expect from in-house leadership.

### **A typical engagement:**

- Includes regular, dedicated time from one or more experts (e.g., one day per week)
- Focuses on driving strategic initiatives and supporting long-term growth
- Spans a flexible 3- to 6-month term
- Operates under a fixed fee agreement for predictable costs

## Consulting

Our Consulting Services are designed to provide you with comprehensive support to address your business's most critical needs. Whether it's implementing a CRM, building out a privacy program, or optimizing your operational workflows, we offer hands-on assistance to ensure your strategies and plans are fully executed. By leveraging our deep industry knowledge and technical expertise, we not only guide you but also take an active role in delivering the solutions your company requires to achieve its goals.

These services go beyond strategic guidance to include the development of detailed work products and direct involvement in executing your initiatives. We collaborate closely with your team, ensuring that every aspect of your project is handled with the precision and expertise it deserves.

**A typical engagement:**

- Provides for a deeper, more involved engagement based on your project's scope
- Includes direct work on implementation, process improvement, or technology adoption
- Over a flexible term based on the project's needs
- Under a custom fee structure aligned with the scope of work.

**HAVE QUESTIONS?**

Don't hesitate to reach out to your point-of-contact at Legaltech Hub for more information about how we can support your business. If you haven't connected with anyone from our team yet, simply [submit your details here](#), and we'll follow up with you right away to discuss how we can help you achieve your goals.