Benesch Flips the Switch to Proactive Business Development with Propense

"Our team is focused on being more than a resource for our attorneys. We want to be strategic partners who anticipate needs, identify opportunities and bring forward ideas that help grow and strengthen client relationships. Propense helps fuel this approach. It gives our team the insights and efficiency to be more proactive and deliver greater value across the firm."

Liz Boehm, Senior Director of Client & Business Development, Benesch

The Challenge

Benesch, a business law firm ranked #116 on the 2026 Am Law 200, is one of the fastest-growing firms in the country. It has climbed 79 places on the Am Law 200 since first appearing on the list in 2017. Headquartered in Cleveland since 1938, the firm has grown to more than 500 lawyers across offices in Cleveland, Chicago, Columbus, New York, San Francisco, and Wilmington. In 2026, it launched a Miami office following the addition of a 20-lawyer real estate finance and structured finance team from Reed Smith. The firm moved up 11 places in the 2026 Am Law 200 ranking, with a 19.7% increase in gross revenue.

The firm's growth has brought new clients, new industries, and expanded practice areas. For the business development team led by Liz Boehm, it has also raised the bar. The team wanted to stay on top of ways to best service its attorneys and the current client base and find the white spaces where Benesch could provide additional services and grow relationships.

This is a team that already knows how to win. Benesch's Marketing & BD Team took home The American Lawyer's 2025 Best Business Team award. Even so, the day-to-day flow of diverse requests was often challenging to manage with information spread across multiple sources. The team had an opportunity to improve how they accessed data, streamlined workflows and collaborated more efficiently.

> *"We were having to go here and there to round up data to help inform decisions, sometimes pulling from as many as six to eight different places to compile the right information."*
>
> **Liz Boehm, Benesch**

Turning a client's service history into a useful idea for a partner involved bringing together several sources of intelligence. The team would analyze financial and matter data, consider relevant news and industry developments, and identify opportunities to strengthen and expand client relationships. With a steady flow of attorney requests and competing priorities, finding time for this deeper, proactive analysis could be challenging.

Liz has a simple standard for what success looks like:

> *"If everyone on our team can find an opportunity each day to be proactive and go to one of our partners with an idea, something that's helpful to them with their clients, a fresh perspective, or a way to add more value to a relationship, I see that as a win for us.*
>
> **Liz Boehm, Benesch**

The Solution

Benesch joined Propense as a beta partner and helped build the platform for the legal industry. After the beta, the firm signed on going forward.

Liz saw the fit right away.

> *"This tool would help us take that more proactive approach and do so in a way that it's not cumbersome or wouldn't require more time. In fact, it would save us time."*
>
> **Liz Boehm, Benesch**

Propense securely analyzes Benesch's own client and matter data to show where clients may have unmet needs. The legwork that used to take several steps now happens in one place. In Liz's words, Propense, "just takes away those extra few steps and helps us get there faster."

Fast, Smooth Implementation

Getting started was simple from both a technology and an adoption standpoint. Loading the data was smooth, and the team was working in the platform almost as soon as it landed.

> *"Getting up and running was, dare I say, pretty easy. From the time that we got the data in the platform, we were almost immediately able to use the tool."*
>
> **Liz Boehm, Benesch**

Core Use Cases in Action

On-demand partner prep. From day one, when a partner was heading into a client meeting, the BD team could look in Propense and send over a few points before the partner walked in.

Client team meetings. Key client account teams are a newer initiative at Benesch. The BD team gives each team a set of information before every meeting, and Propense helped get the initiative off the ground.

Pipeline outreach. Propense helps fuel activity and outreach ideas for the pipelines tied to firm initiatives.

The firm's biggest relationships. Even for top rainmakers with large institutional clients, Propense still surfaces ideas to add value and improve the client journey.

Prospect tracking. The team now tracks potential clients in the platform.

Lateral integration. Onboarding lateral hires wasn't part of the original plan. As Liz put it, "now it makes a lot of sense."

Miami. As Benesch builds out its new Miami office, Propense will help the team see what more the firm can do for clients in that market now that it has boots on the ground.

Tailored RFPs with Hatfield. Every fourth quarter, Benesch sees a wave of large public company RFPs. They span many practice areas and take an average of about two weeks each to complete.

BD managers on Benesch's team now use Hatfield, Propense's AI feature, to fine-tune that content. The managers are able to look at what Benesch does for companies in the potential client's industry, and use that real, relevant experience to better inform the approach to the response. When a major RFP response went out recently, the team agreed that using Propense made it much stronger.

> *"We're now able to look more strategically at our experience with similar companies and industries and use that knowledge to strengthen our proposals. It's a level of insight and customization that we just couldn't achieve previously."*
>
> **Liz Boehm, Benesch**

Competitive Intelligence Partners Can Act On

Liz's team oversees BD-related competitive intelligence for the firm. Outside research tools like PitchBook and Westlaw cover the market view. Propense adds the internal

layer: what attorneys should know about the relationship, along with specific ideas and action items.

> *"We get good feedback on those reports and attorneys particularly appreciate the executive summary component. Propense is now a layer that, when applied, helps us to further tailor and make the executive summary relevant and actionable."*
>
> **Liz Boehm, Benesch**

Impact

Shifting BD from Reactive to Proactive

The biggest change is time. Propense cuts down the effort it takes to identify a proactive approach and decide which idea to bring to a partner. That makes Liz's goal of finding at least one proactive opportunity a day realistic. A team member can spend 10 minutes and walk away with something worth sharing.

Confidence and Trust with Partners

Every recommendation in Propense ties back to Benesch's own client data. That gives the BD team a clear answer when a partner asks why.

> *"Where Propense is extremely valuable is giving our team more confidence in sharing with attorneys "the why" you might want to suggest this to this client."*
>
> *"The recommendations are tied back to the client data. There's just a different level of trust in the data and in the suggestion when partners know that this is coming directly from seeing what we are doing for the client."*
>
> **Liz Boehm, Benesch**

That trust runs both ways. "*It builds the confidence of the BD team in that we can provide information to our attorneys that really is valuable and can directly impact the client relationship in a positive way.*"

Democratizing Access for the Whole BD Team

Before Propense, pulling together a full picture of a client and all its matters, then bringing something meaningful to a partner could feel intimidating. That was especially true for junior team members.

> *"Now I think everyone feels like they have this equal picture and opportunity to dig into this side of business development, which is, to me, the more proactive side of things."*
>
> **Liz Boehm, Benesch**

Driving Adoption

Benesch made adoption a team effort from the start.

Training for the right people. Multiple training sessions, plus the option to invite more colleagues to the biweekly calls with Propense, brought the right people into the platform.

Shared ownership. Two BD managers who were involved in the beta and rollout now work in the platform day to day, so expertise doesn't sit with one person.

Small wins, shared often. The team shares small successes at team meetings, and offers one another use cases.

Easy to teach. Propense is easy to use. The managers can show anyone on the team how it works without heavy training.

Partnership and Service

For Benesch, the working relationship mattered as much as the product. Having Propense as a service partner was part of why the firm decided to sign on after the beta.

> *"The client experience that you provide has just been second to none. You all listened to us and helped us find the value in the product, and even incorporated some of our voice and ideas in that process."*
>
> **Liz Boehm, Benesch**

She called out Alex in particular for listening closely, coming back right away with feedback or an idea, and showing real excitement about working together.

> *"We feel like we're working together with you, and you're truly a good partner to us."*
>
> **Liz Boehm, Benesch**

About Propense

Propense analyzes a firm's accounting, matter, and CRM data, along with current events, to anticipate where clients have unmet needs and recommend relevant services to introduce. Propense is working with some of the most innovative accounting and law firms in the world. Founded in 2023, Propense is backed by Thomson Reuters Ventures, Operator Collective, and Harlem Capital.