

THE PILOT

Data & Insights Pilot

A 4–6 week engagement for small law firms.

Most small law firms sit on years of data inside their practice management system, billing software, and intake tools — and almost none of it is being used to make decisions. This pilot turns that data into a hosted dashboard, a written findings memo, and a prioritized roadmap of operational changes the firm can implement within thirty days.

WHAT YOU GET

- **Live hosted dashboard.** Consolidated dashboard pulling data from your practice management system (Clio, MyCase, PracticePanther, or similar), accounting, and intake sources — answering five questions every managing partner should know cold: where are clients actually coming from, what's our true profitability per matter type, where are matters stalling, what's our intake-to-retainer conversion, and who are our most and least profitable timekeepers.
- **Written findings memo.** Eight to fifteen specific observations and prioritized opportunities across operational efficiency, matter profitability, and AI / automation — each grounded in a specific number from your data.
- **Source-of-truth validation workbook.** An Excel workbook documenting the analytical math behind every finding, with dashboard-equivalent summary tabs, validation pivot tables, raw-data tabs with derived columns, and a “How to read this workbook” guide. You can independently reconcile every number in the findings memo to your own data.
- **Executive findings presentation.** A one-hour walkthrough of the dashboard, findings, and recommendations with firm leadership — including time for discussion and follow-up questions.
- **Prioritized roadmap.** Six to ten concrete next-step opportunities, ranked by expected impact and effort, with clear pointers to which can be executed independently by the firm and which Calrissian could help implement.

PRICING

The pilot is fixed-fee at \$7,500 — all five deliverables above, including the prioritized roadmap and the one-hour leadership presentation. A limited-scope option is available at \$5,000 (dashboard, findings memo, and validation workbook only — without the prioritized roadmap or leadership presentation) for engagements where only the analytical

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layer is needed. Pricing is published; scope is fixed; deliverables are itemized in the Pilot Agreement.

T I M E L I N E

- **Week 1.** Discovery, NDA execution, and read-only system access provisioning.
- **Weeks 2–4.** Data consolidation, cleaning, and analysis. Two 60-minute working sessions with firm leadership.
- **Week 5.** Dashboard build, validation workbook construction, findings drafting, and review with the firm's point of contact.
- **Week 6.** One-hour findings presentation to firm leadership. Pilot complete; deliverables become firm property.

W H A T W E ' L L N E E D F R O M Y O U

- A single point of contact authorized to grant system access and approve scope decisions.
- Read-only access to your practice management system, accounting / billing, and any marketing or intake sources you want analyzed (up to five sources).
- Up to 36 months of historical data from each in-scope source. Engagements requiring deeper historical analysis are scoped separately.
- Approximately four hours of leadership time across the engagement: kickoff, two working sessions, and the findings presentation.

C O N F I D E N T I A L I T Y & D A T A H A N D L I N G

- A standard mutual NDA is executed before any data access.
- Work is performed inside your environment wherever possible. Where data must be processed externally, it is aggregated and anonymized.
- No client PII is retained outside your systems. All source data is destroyed at pilot close, with destruction certified in writing on request.
- Any case study or marketing material referencing your firm requires your written approval before publication.

A B O U T

Calrissian was founded by George Higareda — thirty years in technology, twenty of those spent building enterprise applications and analytics for a Fortune 100 engineering and construction firm with 20,000+ employees. The systems George led there — safety incident management, legal matter management, enterprise timekeeping, and operational analytics — are the kind that quietly do the work of putting clean, trustworthy numbers in front of the people who need them. Calrissian brings that same discipline to

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small businesses that need it but cannot economically support a McKinsey engagement or a \$120K internal hire.

NEXT STEP

A 30-minute call to confirm fit and answer your questions. No commitment.

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