

## THE PILOT

# Data & Insights Pilot

*A 4–6 week engagement for small law firms.*

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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 250 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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