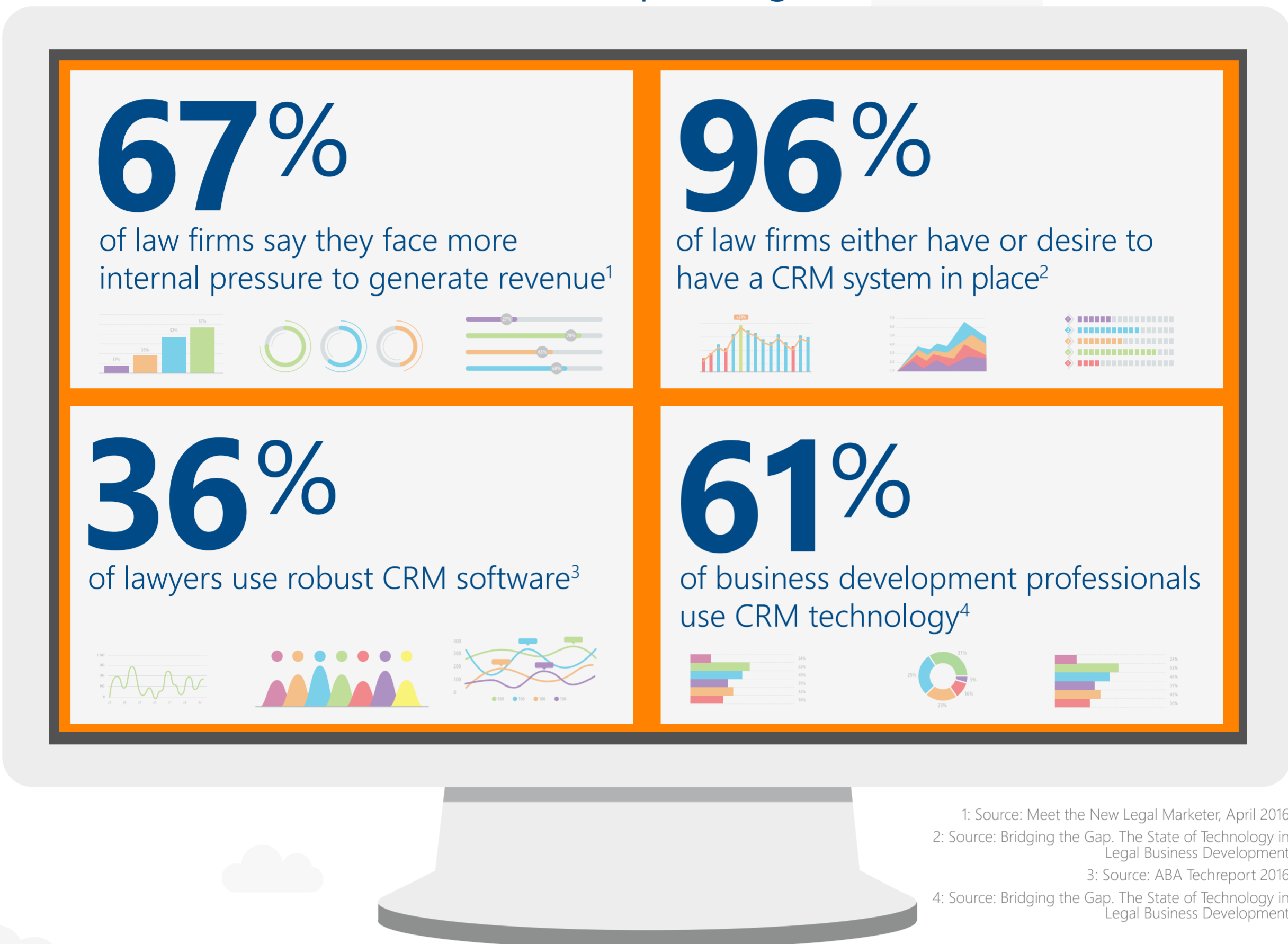


TRANSFORMING YOUR LAW FIRM WITH CLOUD BASED CRM

The case for customer relationship management (CRM) in law firms



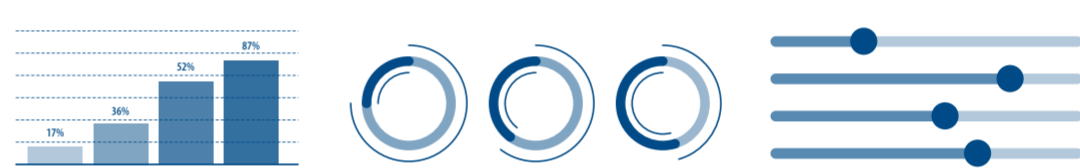
6 reasons why CRM makes sense

Better Marketing Lists

- Current, correct data: fewer bounce-backs, more personalization
- Accurate segmentation: subject matter, industry, geography, timely alerts vs. periodical newsletters
- Track effectiveness of mailings: reads, click-throughs, forwards
- Correlate types of mailings a client receives with the work the firm performs for the client: look for gaps



1



Better Experience Management

- Profile the firm's experience for pitches and proposals, web site, deal directories
- Profile "significant" matters
 - Process triggered when a matter crosses a threshold, e.g., hours worked/billed, value worked/billed
 - Capture legal issues, industry, geography, size, key contacts
 - Other attributes depending on type of matter



3

Better Event Management

- Accurate segmentation
- Track effectiveness: responses, attendees, no-shows, walk-ins, follow-ups
- Correlate event activities to the work the firm performs for a client: look for gaps



4

Better Business Development

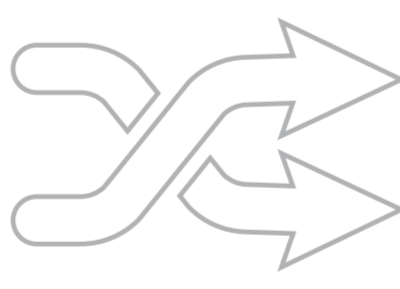
- Make management of pitches and proposals more efficient
 - Examine, prioritize, respond faster
- Capture essential information about the request and determine the appropriate response
 - Strategic client
 - Strategic practice
 - Strategic industry
 - Appropriate geography
 - Important referral source



5

Better Cross-Practice Initiatives

- Assemble the team, define the strategy
- Define intermediate goals to support the strategy
- Define tasks to achieve the intermediate goals
- Assign tasks to appropriate team members
- Monitor progress and results
- Track new or expanded business opportunities and relate them to the efforts of the team



6

Better Referral Management

- Track who refers work to your firm
 - Report on successful completion
 - Solicit additional referrals
- Track business referred from your firm
 - Ensure that referrals are reciprocated



Why choose Microsoft Dynamics 365



Purpose-built
Role based solutions built to deliver client engagement



Productive
Familiar tools in the context of business development processes geared towards law firms



Intelligent
Built-in intelligence to proactively guide to optimal outcomes



Cloud-based
Easily scalable, securely accessible from everywhere, and deeply connected to other productivity tools like Office 365

Interested in exploring Microsoft Dynamics 365 in your firm?
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