

LEGAL 360

Legal360 Overview:

Legal360 leverages more than 25+ years of legal experience and 12+ years of Dynamics CRM experience to engineer and deliver a purpose-built CRM solution that is designed to support the business development and marketing requirements of the diverse practices within the legal marketplace.

Legal360's Pre-Configured Application Layer:

- At the core of the Legal360 solution is the Microsoft Dynamics 365 platform
- Legal360 is a legal application layer that is built to run as an extension of the Dynamics 365 platform for both cloud and on-premise environments
- The Legal360 solution delivers a powerful set of application modules that extend the functionality of Dynamics to support the unique requirements of law practices



Microsoft/Legal360 Functionality:

- Centralized database of clients, accounts, contacts, matters, employees & relationships
- Opportunity Tracking, New Business Intake & Reporting
- Native Outlook user interface delivering full CRM functionality within Outlook
- Track Outlook activities, such as emails, appointments & tasks directly to CRM
- Automatic data harvesting & relationship intelligence tools
- Marketing List, Campaign, and Event Management
- Full mobile platform for phones, tablets & Surface devices
- On-Line & Off-line Functionality to support the mobile work force

The Legal360 Difference:

- Provides a 360° view of clients, contacts, timekeepers, opportunities & matters
- Relationship Intelligence: "It's not always what you know, it's who you know!"
- Case and Matter information tracking
- Client team tracking
- Pre-configured Legal Dashboards & Reports
- Outlook Contact Harvesting, automated contribution/assembly of relationships
- Referral Tracking: Incoming and outgoing referrals
- Competitive Tracking & Analysis, including win / loss reporting
- eMarketing and Marketing Automation Integration

Sync360 - Data Harvesting & Integration

- Outlook Contact Contribution and Relationship Mapping
- Integration with the Industry's leading time/billing/practice management solutions
- Strength of relationship "scoring" to leverage the strongest relationships

360° View of a Client

NEW NEW DASH COMPARE REACTIVITY CONNECT ADD TO MARKETING LIST ASSIGN WEBSITE LINK DELETE FORM

ACCOUNT SUMMARY
Contoso Global Banking Corporation

Summary

ACCOUNT INFORMATION

Account Name: Contoso Global Banking Corporation
Parent Account: N/A
Client Number: 900-1155
Primary Contact: Chris Hughes
Phone: 100-100-1000
Fax: 200-980-1000
Website: http://www.contoso.com

Information

Client Status: Existing
Key Client: No
Practice Area: Banking & Finance
Business Industry: Business Services
Annual Revenue: \$1,575,000.00
No. of Employees: 7,200

Primary Address

Street: 100 Main Street
City: Atlanta
State: GA
United States
ZIP: 30302

POSTS ACTIVITIES NOTES

Start Levey
Left vacation for Stuart
Modified by Cole McIsaac: Today

Contoso - Q2 Client Review Meeting
Due Date: 4/25/2017 10:00 AM
Modified by Cole McIsaac: Today

Contoso Client Team Review
Due Date: 5/2/2017 10:00 AM
Modified by Cole McIsaac: Today

Client Lunches - Contoso
Due Date: 5/2/2017 10:00 AM
Modified by Cole McIsaac: Today

Chris Hughes
Met with Chris to plan a lunch
Completed by Cole McIsaac: Today

Prepare Q1 Report - Contoso
Due Date: 5/2/2017 10:00 AM
Modified by Cole McIsaac: Today

Client Meeting Prep
Due Date: 5/2/2017 10:00 AM
Modified by Cole McIsaac: Today

Contoso - Follow Up Discussion
COMPLETED

CONTACTS

Full Name: Job Title: Address: City:

Chris Hughes
Chief Information Officer
Atlanta

Frank Davis
Chairman and Chief Executive Officer
Atlanta

Gregory Smith
Chief Marketing Officer
Atlanta

Gay Chomper
President
Atlanta

Jim Rogers
Senior Vice President Sales
Atlanta

John Langston
President, International Regions
Atlanta

Opportunities

Name: Account: Practice Area: Prepared By: Status:

Corporate Pitch - Contoso
Contoso Global Banking Corp
Banking & Finance

Matters

Name: Practice Area: Prepared By: Status:

Real Estate Engagement with Contoso
Real Estate
Government Case with Contoso
Government
Contoso Acquisition - ABC Bank
Banking & Finance

Client Dashboard

NEW NEW DASH COMPARE REACTIVITY CONNECT ADD TO MARKETING LIST ASSIGN WEBSITE LINK DELETE FORM

Contoso Client Snapshot

Contoso - Target vs. Actual

Contoso Activity

Contoso Client Team

Activity by Owner and Type

360° View of a Contact

NEW NEW DASH COMPARE REACTIVITY CONNECT ADD TO MARKETING LIST ASSIGN WEBSITE LINK DELETE FORM

CONTACT SUMMARY
Stuart Levey

Summary

General

Full Name: Stuart Levey
Job Title: Chief Legal Officer and SVP
Company Name: Contoso Global Banking Corporation
Email: stuart.levey@contoso.com
Business Phone: 405-100-1000
Mobile Phone: 405-100-1000
Decision Maker: No
Preferred Method of: Any

Details

Marital Status: Married
Spouse Name: N/A
Birthdate: N/A
Anniversary: N/A
Interests: Golf, Tennis, Wine Tasting

Primary Address

100 Main Street
London
United Kingdom

POSTS ACTIVITIES NOTES

Stuart Levey
Left vacation for Stuart
Modified by Cole McIsaac: Today

Stuart Levey
Spoke to the contact about meeting up for lunch next week
Modified by Cole McIsaac: 3/21/2017 11:55 AM

Stuart Levey
Spoke to the contact about weekend plans
Modified by Cole McIsaac: 3/21/2017 11:55 AM

Stuart Levey
Spoke to the contact about the plans for the upcoming year
Modified by Cole McIsaac: 3/21/2017 11:55 AM

Stuart Levey
Had a short conversation with the contact
Modified by Cole McIsaac: 3/21/2017 11:55 AM

Stuart Levey
COMPLETED

Relationships

Employee: Strength: Practice Area Simple: City (Employment):

Ryan Franklin
65 Banking & Finance
New York City

Elizabeth Harrison
27 Corporate
London

Sean Hart
12 Corporate
London

James Watson
8 Banking & Finance
London

Marketing Lists

Name: Type: Marketing:

2016 Holiday Party Invites
Static
Contact

Charity Event Registration
Static
Contact

Compliance and Regulatory
Static
Contact

Corporate Clients
Static
Contact

Contact Interests

Name: Checked On:

Art
8/5/2016 12:27 PM

Gulf
8/5/2016 2:48 PM

Tennis
8/5/2016 2:48 PM

Wine Tasting
8/5/2016 2:48 PM

New Business Pursuit

NEW NEW DASH COMPARE REACTIVITY CONNECT ADD TO MARKETING LIST ASSIGN WEBSITE LINK DELETE FORM

Geographic Expansion with Contoso

Opportunity Information

Description

Contoso is currently seeking legal counsel from a firm that understands that business and corporate structure. Our firm currently works with Contoso in UK and Europe, and should be able to expand the geographical representation to include Australia. Contoso Australia is very similar to UK, and our firm presents a great option for the corporation.

Contoso Client Team

Activity by Owner and Type

Mobile / Tablet User Interface

Home Legal360 Practice Dashboard

Legal360 Practice Dashboard

Active Companies

Active Contacts

Open Opportunities

Geographic Expansion with Mic...

The Coca-Cola Co

Anthony Douglas

Microsoft Corporation

Open Opportunities

Matters / Engagements

Open Opportunities

Closed Opportunities

Full Mobile Applications

Home Legal360 Practice Dashboard

Legal360 Practice Dash...

Active Companies

My Active Contacts

Open Opportunities

Geographic Expansion with Mic...

The Coca-Cola Co

Anthony Douglas

Microsoft Corporation

Open Opportunities

Matters / Engagements

Open Opportunities

Closed Opportunities

Why Us

fast

Pre-configured and ready for a quick implementation, and a quicker return on your investment

easy

Simple to use via the familiar Outlook user interface, or via your mobile devices

flexible

Highly configurable and designed to fit your business and your process; software that fits you, rather than you having to change to fit the software

affordable

Cost effective cloud licensing options, a reduced amount of services required for implementation & configurations, affordable for all sizes of businesses

Contact Us:
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