

LEGAL360

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:

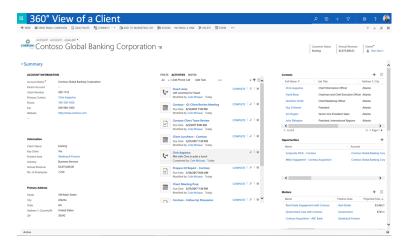
- Centralized database of clients, accounts, contacts, matters, employees & relationships
- Opportunity Tracking, New Business Intake & Reporting
- Native Outlook user interface delivering full CRM functionality within Outlook
- Track Outlook activities, such as emails, appointments & tasks directly 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 Contact

Mobile / Tablet User Interface

Æ

٢

Stuart Levey -=

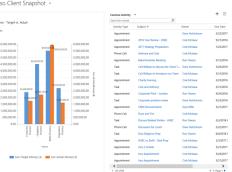
Details Marital Statu Spouse Nam Birthday Anniversary Interests

Primary Addres 100 Main Street London United Kingdom

Home

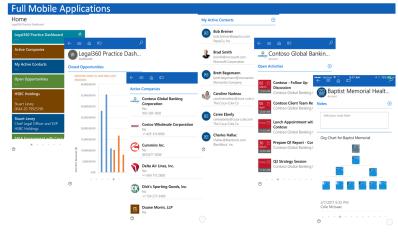
Client Dashboard

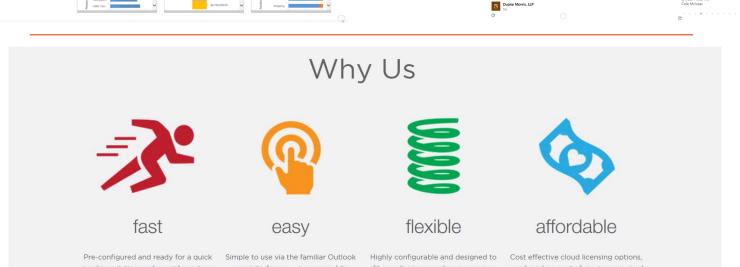
Contoso Client Snapshot 👻





New Business Pursuit P





implementation, and a quicker return on your investment Simple to use via the familiar Outlook user interface, or via your mobile devices

Owner*

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

Contact Us: 137 Johnson Ferry Rd. Marietta GA 30068 info@360verticalsolutions.com 770-285-2360 Cost effective cloud licensing options, a reduced amount of services required for implementation & configurations, affordable for all sizes of businesses