



**RELATIONSHIPS
IMPROVEMENTS
MANAGEMENT
PROFITABILITY**



Microsoft Dynamics CRM

Redefine client relationships with the complete, affordable relationship management solution that drives measurable improvements across your law practice.

More than ever, legal professionals are engaged in the business of law, and the efforts that help them win and retain clients.

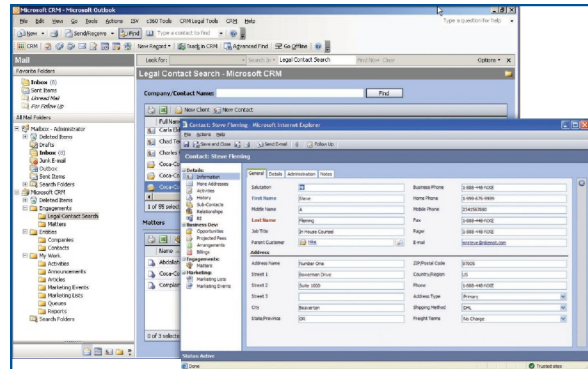
Microsoft Dynamics CRM is a complete client relationship management solution for law firms that provides all of the tools and capabilities needed to create and easily maintain a clear picture of client relationships from first contact, through business development activities and long-term relationship-building efforts.

With modules for business development, matter management and marketing, Microsoft Dynamics CRM delivers a fast, flexible and affordable solution that drives measurable improvements in every business process, enabling closer relationships with clients and helping your firm achieve new levels of profitability.

Microsoft Dynamics CRM provides everyone in your firm a 360 degree view of your relationship networks, prospects, and clients directly from Microsoft Outlook, providing a familiar and intuitive work environment that fosters user adoption and productivity. And because you partner with Calyx Software, it looks, feels and performs the way you want, the way you expect and the way you need.

Three reasons why Microsoft Dynamics CRM works for your firm:

- **Built directly into Outlook.** Microsoft Dynamics CRM is fully integrated, so everyone in your firm will quickly be able to begin using tools to develop new business and marketing processes.
- **A practical, workable solution.** Microsoft Dynamics CRM is flexible, meeting your current needs while providing a scalable platform that will grow with your firm.
- **Easy to use.** Microsoft Dynamics CRM is powerful yet simple, so it provides a familiar and intuitive work environment that enables user adoption and productivity.



Microsoft Dynamics CRM provides access to all important client and contact information from within Microsoft Outlook. Contact details, business information, engagements and history are all at your fingertips.

Works the way you do

Microsoft Dynamics CRM integrates directly into Outlook and other Microsoft applications, including Microsoft Office Word, Excel, PowerPoint and SharePoint. The result: everyone in your firm will quickly begin using Microsoft Dynamics CRM's tools to develop new business and marketing processes.

- Manage and develop client relationships more easily by handling client management tasks — including sending and managing e-mail, storing business contacts and managing your appointment calendar—without leaving Outlook.
- Access client information anywhere through enhanced data synchronisation and mobility features that will enable your firm to access the information they need — at the firm, the courtroom, or anywhere in-between.
- Improve productivity through automation using built-in intelligence that simplifies and automates everyday tasks and business processes.
- Create personalised experiences through workplace profiles and customised views that provide legal professionals with instant access to the information and activities they use most.

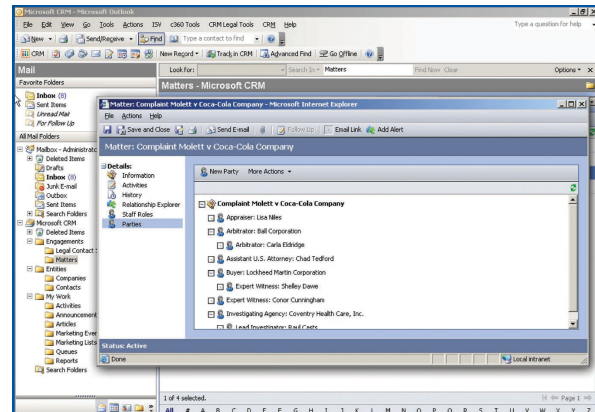
Meets your firm's ongoing needs

Microsoft Dynamics CRM is a flexible solution developed for your law firm's current needs while providing a flexible, scalable platform that will grow along with your firm.

- Meet your law firm's business requirements by tailoring Microsoft Dynamics CRM to match your specific practice's situation. Intuitive, Web-based design tools make it easy to modify application screens, data fields and practice-specific forms.
- Streamline business processes through automation that lets your firm transform repetitive tasks into powerful, automated business workflow.
- Integrate applications and information from time and billing or case management sources to create seamless links across systems and platforms within your firm, all available from one central location.
- Measure the success of your firm's business processes with powerful tracking and analytic tools that help you monitor business development while enabling swifter and more precise decisions.
- Accurately forecast future revenues and manage prospective opportunities to remain competitive and on top of your pipeline of business.



Microsoft Dynamics CRM allows all members of your team to start managing relationships with minimal training, providing streamlined installation and seamless integration with systems across your law firm and beyond.



Consolidation of data stored across multiple law firm systems enables a 360 degree view of all information, activities and relationships related to prospects and clients.

Works with the technology you use

Microsoft Dynamics CRM was developed to enable law firms to fully integrate technologies and data from multiple sources, regardless of where it is created or stored.

From more reliable installations and upgrades, to more streamlined deployment and management and enhanced security, Microsoft Dynamics CRM provides capabilities that will minimise administrative and operational costs and improve user productivity. Designed to provide a highly extensible platform, Microsoft Dynamics CRM can be easily customised to help meet the specific processes of your firm, without expensive services and customisation costs.

- Protect the security of client information with a security-enhanced platform designed to help keep your firm's business data safe, secure and confidential.
- Rapidly search across large volumes of client information with optimised data views and queries.
- Monitor the health of your CRM environment with centralised management, duplicate detection and notification tools.

The value of a CRM solution depends on how quickly it is embraced by the people who will use it. Microsoft Dynamics CRM allows all members of your legal team to start managing relationships with minimal

training. It provides streamlined installation, seamless integration with systems across your law firm (and beyond) and increased levels of reliability, scalability and security. Microsoft Dynamics CRM will help your firm improve productivity and control costs while maximising return on your marketing and business development investment.

Get the whole picture

Microsoft Dynamics CRM connects matters, people, and companies while displaying all related data directly from Outlook. By consolidating data stored across multiple law firm systems (like time and billing and other financial systems), Microsoft Dynamics CRM offers a 360 degree view of all information, activities and relationships related to prospects and clients.

- Access information stored in multiple systems and consolidate it in one centralised repository of data, activities, documents and matters.
- Leverage the collective experience of your firm to identify internal skills and experience found in matters.
- Arrive prepared for important client meetings by accessing relevant history for each client from all parts of the firm.
- Unify customer e-mail and responses by automatically capturing discussion threads as part of each client's history record.

Build new revenue opportunities — It's Relationship Intelligence that pays

Microsoft Dynamics CRM provides your firm the tools necessary to build your business and support your marketing efforts. With powerful Relationship Intelligence tools that work directly from Microsoft Outlook, your staff will be able to access data about the companies and people with whom they build relationships, allowing them to view the complex relationships and links that exist between them and build new revenue opportunities.

Marketing: A clearer view

In today's information-driven economy, most law firms are awash in client data. Success requires the ability to transform that information into clear, actionable knowledge and respond more quickly to changing client needs and preferences. With Microsoft Dynamics CRM, your business development and marketing efforts can become more collaborative.

- Create a single view of each person or company based on every piece of information your firm collects, all stored in a single location that is accessible across your firm.
- Focus your marketing efforts using intelligent marketing management tools integrated with Outlook to manage events more effectively.
- Create and easily manage marketing lists and make them available to attorneys directly from Outlook, making it easy for them to contribute and view participants.
- Understand what your clients are telling you with reporting and analysis tools built on SQL Server Reporting Services that provide the precise knowledge your law firm needs to respond quickly to client demands and changes in your practice.

Manage your opportunities

Microsoft Dynamics CRM provides easy-to-use features to improve the way you do business, target new clients and drive business development activities.

- Use Microsoft Dynamics CRM to build customisable Client Plans that outline strategies and steps to increase your book of business with specific prospects and clients.
- Spend time with the right leads and prospects. Establish consistent follow-up processes and automate activities with powerful system workflow.
- Comprehensive reports let you forecast potential revenue, measure business activity and performance, track business development success and identify trends, problems and opportunities.

Avoid costly data conflicts

Duplicate Detection is more than a way to eliminate inconvenience and data duplication. To a law firm, the ability to detect if a client is already in their database could prevent costly conflicts of interest. Duplicate detection features in Microsoft Dynamics CRM intelligently and passively determine if duplicate entries exist.



Calyx is one of the most successful, end-to-end Information & Communications Technology companies in the UK and Ireland. With a reputation for excellence that has been built over 20 years, we consult, design, build, implement and provide training, support and management for the ICT needs of leading companies and public organisations.

Today, with a turnover of £100m and over 500 experienced engineers, support and sales staff throughout the UK and Ireland, Calyx has the breadth of capability and depth of expertise to take care of every aspect of your ICT through its entire lifecycle.

Calyx specialises in the design, development, implementation and support of Microsoft Dynamics technologies.

The success of your company is directly related to the success of the people who work for you. Microsoft Dynamics is a line of integrated, adaptable business management solutions that enable your people to make important business decisions with greater confidence.

Microsoft Dynamics works like and with familiar Microsoft software—easing adoption and reducing the risks inherent with implementing a new solution.

These solutions automate and streamline financial, customer relationship, and supply chain processes in a way that can help you drive business success. Microsoft Dynamics comprises several unique software products to meet almost any business need.

But to get the most out of Microsoft Dynamics you need the specialists.

As a Gold Certified Microsoft Business Solutions partner, we have worked with organisations of all sizes in both the public and private sectors, helping them respond to changes and deliver real business benefits based around Microsoft Dynamics solutions.

With us as your partner and Microsoft Dynamics as your platform, you can get up and running quickly, maximising the productivity of your people and increasing confidence that your solution will adapt to the changing needs of your business.

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