

Foundation Strategic Relationship Management

The Missing Component of Your CRM Strategy

Easy access to what you know, what you've done, and who you've done it for is the foundation of your firm. That's why the Foundation Firm Intelligence platform from Litera transforms a firm's disparate data about clients, matters, people, and parties into usable and actionable information. Integrated applications for Experience, Expertise, and Strategic Relationship

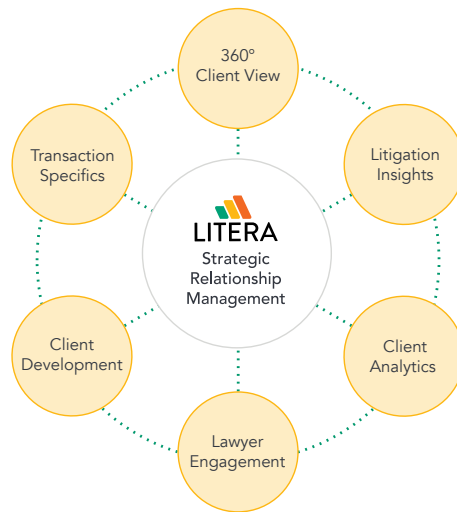
Management operationalize your firm knowledge to improve client service, win new business, and gain insight into both the business and practice of law.

Finally, a 360° View of Your Client

Foundation adds rich experience history, lawyer relationships, firm-defined analytic fields, and external business data to the information it passively collects from disparate firm systems. The result is a single, comprehensive client view with actionable insights to drive client growth.

Find out:

- What work your firm has already done for a client
- Who was involved
- How much it was worth
- What other work you should be doing
- How they tally on relationship health indicators



Foundation Strategic Relationship Management
A Key Component of a Firm's CRM Strategy

Practical Business and Client Insights

Foundation breaks down data silos to show you a full picture of your existing clients across practice groups, types of work, industries, and geographies. Combining enriched client, financial, and experience data allows you to segment across fields for strategic analysis and to prioritize targeted business opportunities.

Data Driven Client Development



Mitigate Attrition Risk...by tracking partner engagement and a client's ongoing activity across practice groups.



Assess Client Health & Performance...key client analytics provide indicators to assess relationship health and inform client strategy at a glance.



Expand Business Relationships...segment clients based on firm-defined criteria. Quickly identify the clients and segments most likely to deliver the greatest opportunity.



Target Cross Selling Opportunities...leverage built-in white space reporting to identify clients who have engaged the firm in one area but not another.



Discover Who Knows What...a rich combination of experience, client, and people information makes it easy to find out who knows whom, who knows what, and who had done what type of work.



Prep for Client Briefings...give client and practice teams access to rich client profiles summarizing the key touch points of a client's relationship to the firm.



Drill Down for Insights...examine relationships from every angle by using Foundation's intelligence platform to pivot across industries, markets, companies, lawyers, third parties, and more and then dig into the relevant details.



Track Portfolio Companies...unlock the direct and indirect relationships and potential opportunities within holding companies, private equity firms, investment funds, and other interconnected clients.

Your Knowledge is Your Competitive Advantage

In an increasingly competitive landscape, firms that leverage their data as a strategic differentiator will capture a greater share of the market. Foundation consolidates data from systems such as time and billing, new business, and CRM to provide a single source of truth. AI-enhanced matter profiling, triggered surveys, and defined approval processes continuously enrich a firm's data so that it is comprehensive, complete, and up-to-date.

The Foundation Firm Intelligence platform includes integrated applications to support every stage of the client relationship from generating compelling proposals and pitches with qualified teams to win business to leveraging internal experts with relevant experience during the course of the matter and providing insights into the relationship to highlight opportunities for growth. Foundation also makes it easy to share your collective intelligence with other applications in the firm.

