

Inprotech CRM WorkBench Module

CONTROLLING EVERY OPPORTUNITY

Inprotech is a complete IP and practice management solution. The CRM WorkBench Module helps you expand your business by focusing the firm's marketing efforts on profitable and specific opportunities.

Entirely browser-based, the WorkBench modules are ideally suited to co-ordinating work and staying in touch wherever your team is located. The CRM WorkBench Module facilitates easy access to marketing and business development information and lets you monitor campaigns and track activities while on the road, sending instructions to your staff and updates to your contacts. Whether your firm is undertaking a direct mail campaign, planning a seminar, or taking part in an industry trade show, you can record details of prospective clients and potential business in the CRM WorkBench Module.

KEY FEATURES

RELATIONSHIPS

Business development is all about connections and relationships. When you can see links between companies you deal with, their staff, their associates, and your staff, you can visualise potential opportunities. The CRM WorkBench shows you these networks in a relationship diagram that can be accessed wherever name details are listed. Simply moving the mouse pointer around the screen allows you to view additional details: symbols are used to identify categories of names and you have the option to vary the depth of relationships illustrated.

Firms using Reciprocity & Statistics as well as the CRM WorkBench Module have the added advantage of being able to compile lists of clients based on their value to the firm. The Reciprocity search shows the value of cases and opportunities associated with current and potential clients. When this method is employed to create dynamic, targeted marketing campaigns, the firm's resources are more effectively used.

LEADS AND OPPORTUNITIES

All potential business opportunities can be recorded in the CRM WorkBench Module. It only takes a minute to make a note of the person you are dealing with, the potential value and type of work being discussed, the source of the lead, and responsible staff member. These details are then permanently on hand for future reference. Attributes can be used to classify leads and prospects and to manage mailing groups, for example, for newsletters and circulars.

The CRM WorkBench Module allows you to individually track a number of leads associated with one potential client. The status of a lead can be amended when negotiations become more complex, giving you the option to add more information. Details of competitors and current providers are easily added and you can make notes about these companies. Meeting and deadline reminders help ensure you actively manage each step of all potential business opportunities.

EVENTS AND CAMPAIGNS

The CRM WorkBench Module puts you in control. You determine the list of services or products you want to track and decide how much information about each opportunity is warranted. Budgets and actual expenditure, in foreign or local currency, attendee details (both staff and contacts), are all catered for. You can add to and remove names from invitation lists and enter responses as they are received.

The Campaign and Marketing Event framework is flexible enough to suit the way you work and the business development workflow is seamless when built around the staples of the Inprotech system — events, reminders, checklists, standing instructions. A prospect associated with an opportunity can be automatically converted to a client when new business is won — with the name type being changed to Instructor and the lead name converted to become an employee of this client.

INTEGRATION

All Inprotech modules are integrated so you and your team have access to all the information you need without having to know anything about the back office programs and database behind the scenes. Using Exchange Server integration within the CRM WorkBench, expands your options allowing you to select people who should be invited to marketing events from your e-mail address book. Names associated with marketing activities can be exported to other programs providing up-to-date and accurate lists that can be used in correspondence and marketing material.

SPEED AND FLEXIBILITY

Quick searches in the CRM WorkBench give ready access to details of all your leads, opportunities and marketing activities. When you want to send an email to a prospect, use the quick search — select Name, type part of the name in the field, and click Go — the email address is there. When you've forgotten an address, use the quick search — a few keystrokes and you have it.

More complex queries and reports are set up and saved through advanced searches. Once a new query or report format is saved, it can be used as readily as the quick search. Details retrieved through a search can be opened in a Microsoft® Excel worksheet, exported in XML format (for data exchange) or printed as a PDF report.

ACCESS AND SECURITY

Access and security in the WorkBench modules is built around roles, not data. All staff members using the WorkBench modules can be assigned roles that give them access to only the specific information they need on a routine basis.

The Customer Relationship Manager role delivered with the WorkBenches is set up with the web parts, tasks and subjects required to use the CRM functionality. This model puts the focus on the way individuals need to work, rather than having a database structure determine the security restrictions. Name setup and search restrictions ensure that leads and prospects are isolated from staff responsible for managing cases. When CRM related relationships are created they are marked as CRM only by default.

EASE OF USE

All the familiar features that make a browser easy to use have been incorporated into the Inprotech WorkBench modules. In addition, the interface can be adapted to suit each individual's needs, with the presentation of information tailored to suit the way people want to work.

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