

CLIENT RELATIONSHIP MANAGEMENT

Develop and grow your business through effective client engagement with Tikit ClientConnect

Tikit ClientConnect is a new, innovative Client Relationship Management (CRM) solution designed specifically for law firms. Fully integrated with Partner for Windows, Tikit ClientConnect helps firms to focus on developing and growing their business through effective client engagement.

A NEW APPROACH

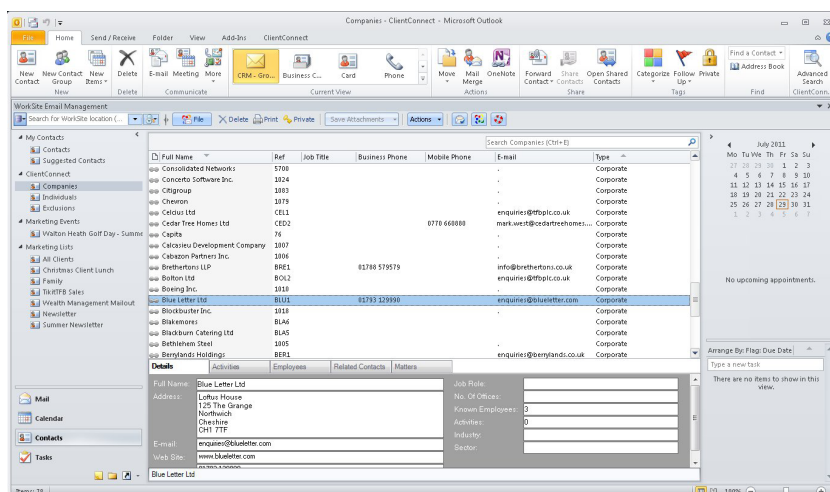
Tikit ClientConnect represents a new approach to CRM in the legal market. Using over 16 years of market experience, the Tikit Group have designed a best of breed solution built entirely in Microsoft Outlook and using Microsoft SQL Server database.

It combines standard, firm-wide marketing and CRM functionalities, with a low cost of ownership and ease of implementation, therefore addressing the challenges that have previously prevented many law firms from adopting a CRM system. As a result, firms can now take advantage of the following benefits:

- **Intuitive and easy to use** - users never have to leave Microsoft Outlook to access any of their contact data held in Partner for Windows. If a user knows Microsoft Outlook they will know Tikit ClientConnect
- **Opt-in marketing preferences** - recipients of emails can update their marketing preferences to allow better targeted communications and easier management in a single click
- **Better campaign management** - easily track readership of newsletters and mailings to better refine content
- **Greater visibility of marketing activity** - fee-earners can quickly view the marketing activity in their client accounts
- **Access and share contact information quickly and easily** - contacts can easily be shared and synchronised between Tikit ClientConnect and Microsoft Outlook
- **eMarketing integration** - eMerge, the leading legal email marketing solution, forms a core component of Tikit ClientConnect

“With Tikit ClientConnect, we believe we are introducing new technology that brings world-class software to a section of the legal market that has previously struggled to find suitable, cost effective legal CRM and marketing solutions.”

David Lumsden
Chief Executive
Tikit Group Plc



Tikit ClientConnect is built entirely in Microsoft Outlook, allowing users to easily view relationships between clients, marketing activity and ensure that data is up-to-date.



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A PARTNER FOR WINDOWS FACT SHEET

LAW AND CLIENT MANAGEMENT

The legal market is becoming more and more competitive. Clients are being more demanding and with the recruitment of in-house lawyers, pressures are increasing. As clients consolidate, the balance of power between lawyer and client is changing further. For a firm to grow, a client management approach focusing on profitable clients, is the only viable solution.

Tikit ClientConnect helps deliver a more effective approach to client relationship management. It allows a firm to understand the efforts needed to grow clients and be competitive through:

- Presenting a complete picture of your relationship networks, clients and prospects
- Identifying and exposing the interconnections between people and firms so lawyers can quickly and easily leverage firm-wide knowledge
- Facilitating business development and marketing activities making them more streamlined, quantifiable and predictable

... and all of this is managed in Microsoft Outlook!

- **Solution flexibility** - Tikit ClientConnect can be provided as an on-premise solution or cloud-based service
- **Low cost of ownership** – allows firms to quickly identify and deliver return on investment
- **Fast implementation and integration** – ensures firms can derive real benefit from the new system as quickly as possible

TIKIT CLIENTCONNECT AND PARTNER FOR WINDOWS

Tikit ClientConnect sits neatly alongside Partner for Windows, pulling through data already held in the database into the interface within Microsoft Outlook. Users can:

- Add new contacts
- Amend existing contact details and manage relationships
- Create marketing lists for direct marketing campaigns and profiling exercises
- Manage marketing events - events, direct marketing campaigns etc.
- Schedule eMarketing campaigns via eMerge, the integrated email broadcast tool
- Search the database with the intuitive drag and drop advanced search function

Any changes users make to data in Tikit ClientConnect will automatically be replicated in Partner for Windows (and vice-versa) meaning only a single instance of data entry is required for both applications.

Pre-requisites for Tikit ClientConnect:

If you are an existing Partner for Windows user you will need to ensure you are on version 3.01-26 or above and be using Microsoft Outlook 2007 or above.

N.B. The eMarketing functionality requires access to two IIS servers. One internal to your LAN to generate eMarketing emails, and one external to your LAN. Please contact TikitTFB for more assistance.

THE CRM METHODOLOGY

The Tikit Group have worked with CRM systems for over 16 years and have implemented them in many law and professional services firms. This experience has provided an excellent understanding of the key factors that make CRM a success. Fundamental to this success is to understand exactly what the users will be asked to do and to make those processes as simple and intuitive as possible. Tikit, therefore, provides a set of functional processes common to law and professional services firms and which supports a robust CRM strategy. Tikit ClientConnect has been designed with these in mind and, with the power of the Microsoft Outlook interface, succeeds in allowing professionals to manage their relationships without adding unnecessary layers of complexity.

Leveraging Tikit's CRM business processes as a starting point, a firm can quickly refine them to derive a configuration for Tikit ClientConnect and the relevant messaging and training content for the firm. This approach accelerates the time it takes to deliver successful CRM to the desktop while ensuring an engaged and empowered user base.

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