

# IntelliPad from Versys Software, Inc.

## CRM for Law Firms Designed Specifically for Outlook

### A few questions for you ...

- Do attorneys, administrative assistants, and staff use Outlook to manage contacts?
- Is it critically important to keep contact information consistent and correct?
- Is it valuable to have immediate access to up-to-date contact information for marketing purposes?
- Would you install a CRM to do these things if it was efficient and economical?

If you answered “Yes”, we think that IntelliPad is a great solution for your firm.

“Other marketing systems required us to change how our users work in order to gain ‘relationship intelligence’.

We know this change is unrealistic; we’ve heard the horror stories about failed implementations. IntelliPad gives us exactly what we need: accurate address and contact information in a central database combined with easy to use marketing tools, all based on Outlook and SQL Server. It’s perfect.”

- IT Manager  
150 Attorney Firm

### Outlook view of an IntelliPad Contact

The screenshot shows an Outlook contact record for Ms. Patricia Abbott. The contact is linked to the 'Marketing Database' in IntelliPad. Annotations include:

- A callout pointing to the 'Marketing Database' checkbox: "If this is checked, the contact is shared in the firm-wide database. (The label 'Marketing Database' can be changed.)"
- A callout pointing to the 'Salutation' field: "A Salutation to be used for mailings."
- A callout pointing to the 'Public Notes' section: "Public Notes are shared. 'Notes' below, are not shared."
- A callout pointing to the 'ContactLink' link: "A link to open the 'ContactLink' browser view of firm-wide shared contacts, which includes the ability to search for contacts by company or person name or by phone number, and to optionally download selected contacts into Outlook."
- A callout pointing to the 'ContactLink' link: "ContactLink also provides a very efficient way for attorneys and other professionals to see and change which of their contacts participate in marketing events and mailing lists."

An additional IntelliPad page is also provided in Outlook to indicate participation in Marketing Events and Mailing lists and optional Contact Type, Categories, etc..

## IntelliPad Features

IntelliPad designed for law firms and professional organizations, with three clear objectives:

- 1) Let attorneys and staff continue to use Outlook for contact management, and let them easily mark contacts for marketing event and mailing list inclusion
- 2) Ensure all information is accurate, up-to-date, and consistent for all attorneys who interact with a particular contact
- 3) Provide efficient methods to facilitate event and mailing management

In order to meet these objectives, IntelliPad runs in the background, capturing changes to Outlook contacts and brings those changes into a centralized SQL database. IntelliPad also keeps contact information up-to-date across all users in Outlook. IntelliPad is built on an advanced technology platform, leveraging the best tools available from Microsoft and Adobe.

# Your Firm's Culture Does Not Need to Change

## One attorney's opinion of IntelliPad

*"What we needed was an easy way to keep a central address book up to date without changing how users work in Outlook. Then, we needed an easy way to use that address information to send out mailings and manage marketing events.*

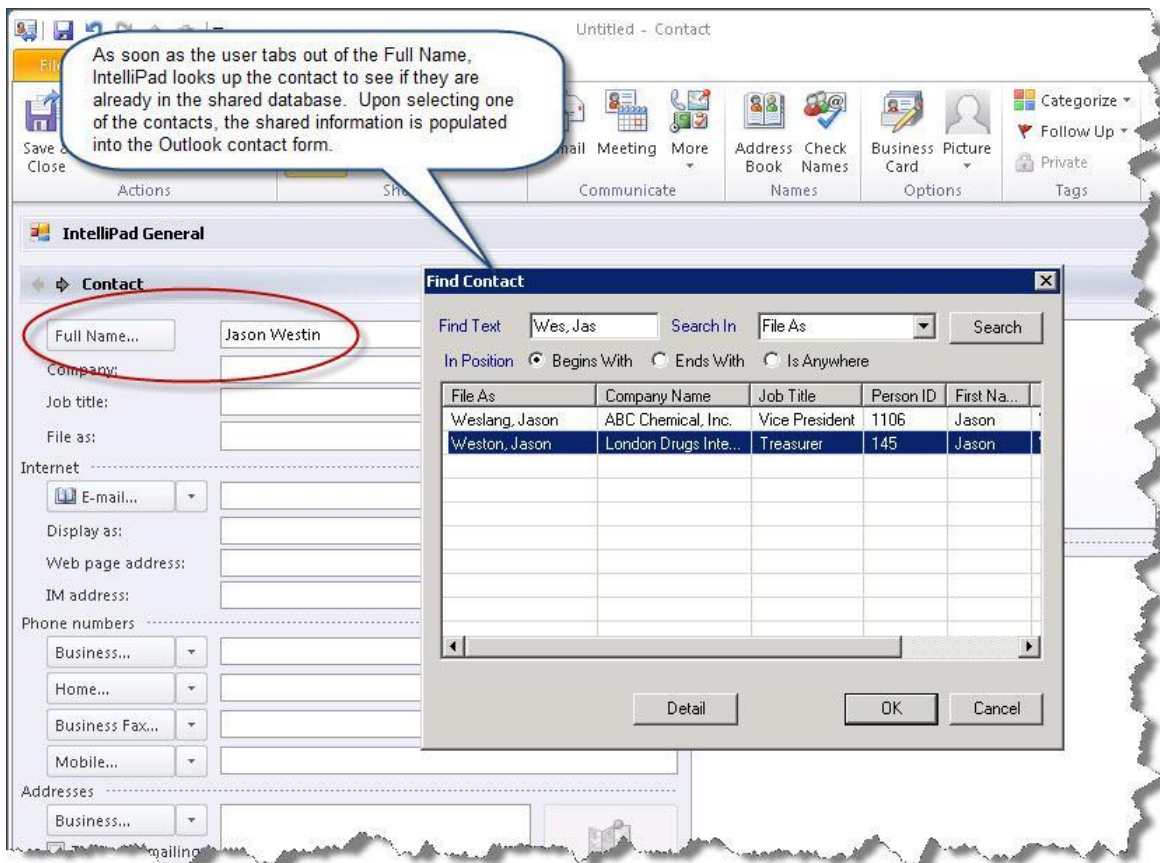
*With IntelliPad, we have that capability and we easily share notes and comments about people. It is cost effective and, most importantly, does not change how we work."*

## Attorney and Staff Benefits

- Centralized cross-reference for contacts already known to the firm. When new Outlook contacts are entered, the name is automatically looked up in the central database and the IntelliPad information is used to fill in the Outlook Contact form.
- Normal use of Outlook with a slightly enhanced Outlook contact form provides up-to-date firm-wide marketing information about each contact.
- Immediate access from within Outlook to: who else knows the contact, who else the firm knows at a company or organization, contact modification history, and optional client-level financial information.
- Training is accomplished in minutes, not hours.

### **Automatic Name Lookup in Outlook for new contacts**

The system quickly identifies that a person is already known to the firm, eliminating the need to re-enter the same information.



## Attorney and Staff Benefits, continued

### Easy lookup of all shared contacts in the IntelliPad database

By clicking a button in Outlook, attorneys and administrative assistants can easily search for contacts by name, company name, or phone number. (All searches, detailed views, and downloads are audited.)

The screenshot displays the IntelliPad ContactLink application interface. On the left, a list of contacts is shown with 'Anderson, Robert' highlighted. A callout box explains that clicking a contact name displays detailed information, which can be copied/pasted for envelopes and emails. The detailed view on the right shows contact information for Robert Anderson, including his mailing address, full name, company name, job title, file name, primary email address, website, invitation label, categories, creation and modification dates, telephone numbers, addresses, and notes. It also lists users sharing the contact: Jones, Attorney (ajones@versys.com) and Smith, Attorney (asmith@versys.com).

**IntelliPad - ContactLink®**

Find/Add Contacts | Marketing Events | Past Marketing Events

**Contact Information**

**Basic Information**

Mailing Address	Robert Anderson Legal Services Coordinator - Eastern Region London Drugs International 1700 Market St San Francisco, CA 94111
Full Name	Robert Anderson
Company Name	London Drugs International
Job Title	Legal Services Coordinator - Eastern Region
File As	Anderson, Robert
Primary Email Address	<a href="mailto:randerson@ldi.com">randerson@ldi.com</a>
Website	
Invitation Label	
Categories	Energy, Probate, Real Estate - Transactions
Created By	Attorney Jones on 04/14/10 08:42 AM
Last Modified By	Jim Gillon on 01/26/12 12:08 PM

**Telephone Numbers**

Business Phone	(604) 687-3799
Business Phone 2	
Business Fax	
Mobile Phone	
Home Phone	

**Addresses and Notes**

Selected Mailing Address	company
Company Address	1700 Market St San Francisco, CA 94111
Home Address	
Other Address	
Public Notes	>>> Jim Gillon wrote on 05/12/11: This is my note...

**IntelliPad Users Sharing this Contact**

Jones, Attorney	<a href="mailto:ajones@versys.com">ajones@versys.com</a>
Smith, Attorney	<a href="mailto:asmith@versys.com">asmith@versys.com</a> (Primary User)

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## Marketing Department Benefits

- Be confident that name and address information is uniformly up-to-date, by exercising control over new and changed contact information with automated data cleansing and optional levels of human review.
- Select contacts for events easily with the IntelliPad advanced searching capabilities.
- Send emails to all or selected attorneys with clickable links to a list of their own contacts with check boxes for event or mailing list participation.
- Produce HTML-formatted emails, mailing labels, badges, etc.
- Streamline holiday card mailings for hard copy or eCards, the ability of attorneys to mark with contacts they want to “sign” and the production of paginated labels by attorney with routing slips, or eCards with a signature block for respective attorneys’ names and individual comments.
- A comprehensive logging of all activity, including all activities related to mailings and marketing events
- Create unlimited reports, with in-line prompting or saved searches

## Firm and Information Technology Benefits

- Reduced frustration for attorneys who would otherwise need to assist in data cleanup for each mailing and marketing event.
- Reduced “CRM” training because of how well IntelliPad leverages the normal use of Outlook.
- Access to a central Microsoft SQL Server Database for IntelliPad contact information, including alternative uses such as for a firm Portal and integration with data appliances for new Users and importing contact information from other firm sources.
- Extensive inquiries and reports that can be shared with attorneys
- Outlook becomes the single point-of-entry for contact information, with updates to IntelliPad and to the same contact in other attorneys’ Outlook folders.
- IntelliPad works with both single and multiple and clustered Exchange Server installations.
- No software needs to be installed on the Exchange Server.

## Versys Software, Inc.

Versys Software and its predecessor Versys Corporation have an over 25-year history of providing high quality products, accompanied by full service to clients in the legal community and other attorney organizations.

Prior to focusing on the legal profession in 1985, the forerunner company developed attorney billing software for the medical profession, full accounting and project management software for construction companies, and inventory and parts management for auto dealership businesses. This varied background provided the basis for the development of the Legal Insight billing, accounting, and practice management software – and more recently, the IntelliPad CRM software.

The company is headquartered in San Francisco. With staff members located in Arizona, Massachusetts, and New Jersey, Versys offers up to 12 hours of availability on all working days and is happy to arrange for after-hours support services when needed.

On-site consulting and training is available for new software installations and support services as requested. All installation and support work can be, and is usually done over the Internet, which reduces costs and is more convenient to schedule. Our clients consistently report that our support staff is friendly, capable and responsive.

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