

IntelliPad from Versys Software, Inc.

Marketing 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 Law Firm

Outlook view of an IntelliPad Contact

The screenshot shows an Outlook contact record for Ms. Patricia Abbott. The IntelliPad General tab is active, displaying a 'Marketing Database' checkbox (checked), a 'Salutation' dropdown (set to 'Pat'), and 'Public Notes' with a text entry: '>>> Lynda Hendrell wrote on 1/13/2012: Met by introduction from Jack Shellman at a Rotary lunch.' Below this is a 'ContactLink' section with a description: '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. 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.' A 'Public Notes' section indicates that notes are shared. A contact card for Ms. Patricia Abbott is visible on the right, showing her name, company (Wonderland Toys, Inc.), and contact information. Callout boxes provide additional context: one points to the 'Marketing Database' checkbox stating 'If this is checked, the contact is shared in the firm-wide database. (The label "Marketing Database" can be changed.)', another points to the 'Salutation' dropdown stating 'A Salutation to be used for mailings.', and a third points to the 'Public Notes' section stating 'Public Notes are shared. "Notes" below, are not shared.'

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 is a web-based marketing application designed by and for law firms, with three clear objectives:

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

In order to meet these objectives, IntelliPad runs in the background, capturing changes to Outlook contacts and bringing those changes together in a centralized SQL database. IntelliPad then keeps contact information up-to-date across all users. 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 need is an easy way to keep a central address book up to date without changing how users work in Outlook. Then, we need an easy way to use that address information to send out mailings and manage marketing events.

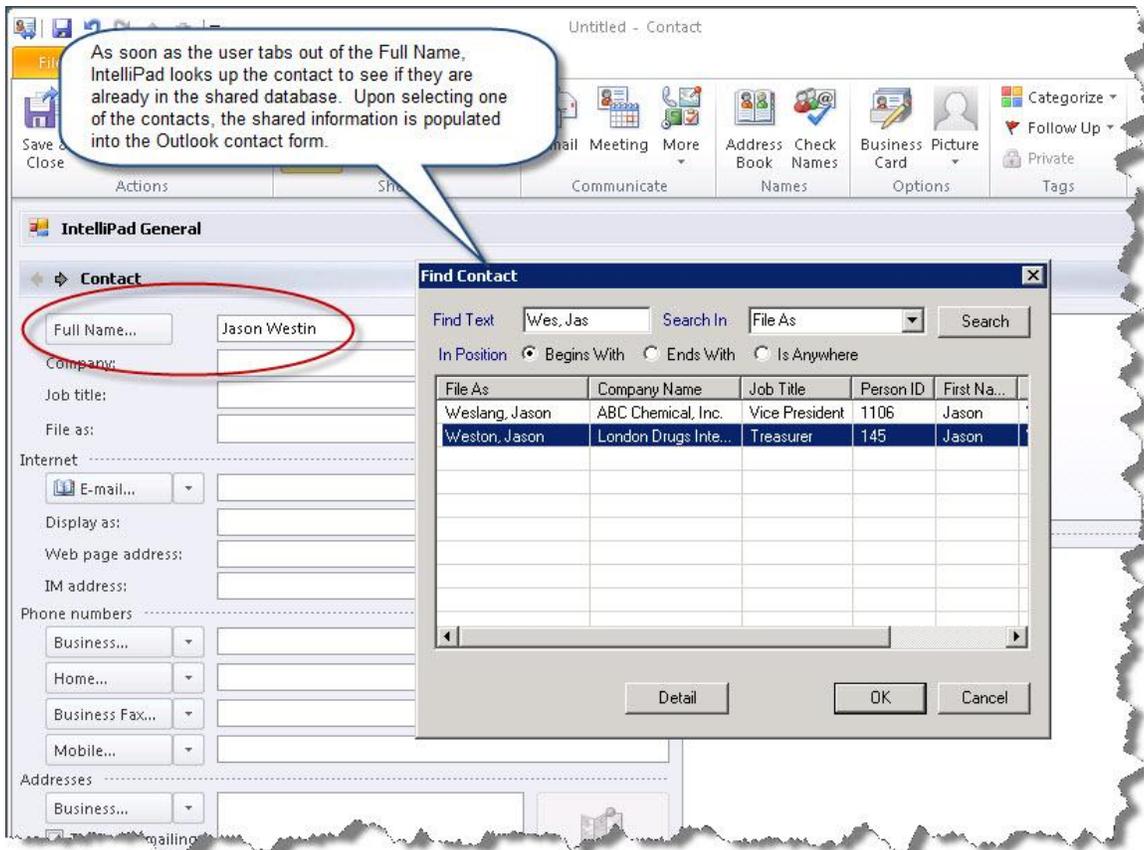
We share notes and comments about people easily with IntelliPad. It is cost effective and does not change how we work."

Professional and Staff Benefits

- Central cross-reference for contacts already known to the firm. New contacts are automatically looked up in the central IntelliPad database. The IntelliPad information can be used to fill in the Outlook Contact form.
- Normal use of Outlook with a slightly modified Outlook form provides up-to-date firm-wide marketing information automatically.
- Immediate access from within Outlook to: who else knows the contact, contact modification history, business development contact follow-up email reminders, and optional client-level financial information.
- Training is accomplished in minutes, not hours.

Automatic Name Lookup for additions to Outlook

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



Professional 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 and detailed views are audited.)

The screenshot displays the IntelliPad ContactLink interface. On the left, a list of contacts is shown with 'Anderson, Robert' circled in red. A callout box points to this contact, stating: 'By clicking the contact name, the detailed information is presented. The address can be copied/pasted for an envelop and email addresses can be clicked to create emails. Searches can be by the name of contact or the company.' The right side of the screenshot shows the 'Contact Detail' window for Robert Anderson, which includes sections for Basic Information, Telephone Numbers, and Addresses and Notes. The 'Basic Information' section lists: Mailing Address (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 (randerson@ldi.com), Website, Invitation Label, Categories (Energy, Probate, Real Estate - Transactions), Created By (Attorney Jones on 04/14/10 08:42 AM), and Last Modified By (Jim Gillon on 01/26/12 12:08 PM). The 'Telephone Numbers' section lists Business Phone (604) 687-3799. The 'Addresses and Notes' section lists Selected Mailing Address (company), Company Address (1700 Market St San Francisco, CA 94111), Home Address, Other Address, and Public Notes (>>> Jim Gillon wrote on 05/12/11: This is my note...). Below this is a section for 'IntelliPad Users Sharing this Contact' listing Jones, Attorney (ajones@versys.com) and Smith, Attorney (asmith@versys.com) as the Primary User. Buttons for 'Close' and 'Print' are at the bottom right.

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
- Automated attorney emails for efficiently refining their own contact's participation in mailings and marketing events
- Easily produce HTML-formatted emails, mailing labels, badges, etc.
- Streamline holiday card mailings, including paginated labels by attorney and routing slips when needed
- Maintain complete history of mailings and marketing events
- Create unlimited reports, with in-line prompting or saved searches
- Access the complete audit of who changed what and when

Firm and Information Technology Benefits

- Significantly reduced frustration for professionals as compared to introducing alternate methods of tracking contacts, instead of simply utilizing Outlook
- Significant savings from reduced training requirements based on 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
- Reduced requirement for printed reports with IntelliPad Views via a Browser interface
- Outlook as the single point-of-entry for contact information, with updates to IntelliPad and the same contact in other professionals' Outlook folders.
- IntelliPad works with both single and multiple and clustered Exchange Server installations.
- Nothing needs to be installed on the Exchange Server.

Versys Software, Inc.

Versys Software and its predecessor Versys Corporation have an over 20-year history of providing high quality products, accompanied by full service to clients in the legal community and beyond.

Prior to focusing on the legal profession in 1985, the forerunner company developed professional billing software for the medical profession, full accounting and project management software for construction companies, and inventory and parts management for the auto dealership business. 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.

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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