



FOUNDATION
365

A Single View of Client Data Across Microsoft 365—Powered by AI

The CRM born in legal, built on Microsoft.



Modern solution purpose-built for law firms



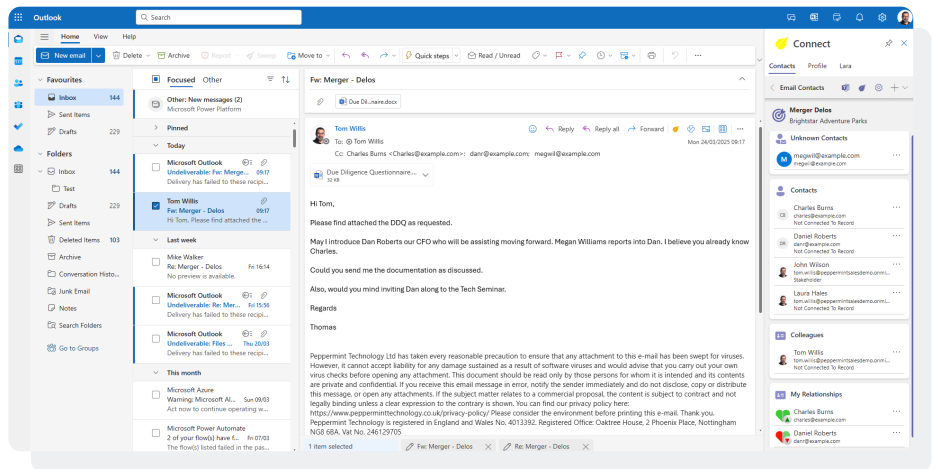
360-degree client view on any device



Seamlessly integrated into Outlook and Teams



Highly flexible, enabling you to start fast and scale forever



Meet lawyers where they work

No more switching between multiple screens – access all CRM data and functionality in Teams and Outlook.

✓ Reduce Context Switching

Access insights within Microsoft Outlook and Teams, minimizing the need to switch between applications, saving time and reducing errors.

✓ Do more with Azure

Foundation 365 is 100% Microsoft native. Built on Microsoft's secure cloud platform, Azure, Foundation 365 leverages our full suite of law firm applications to deliver an enhanced user experience, extending your law firm's investment in the Microsoft Cloud.

✓ Accelerate Productivity

Leverage the power of Microsoft 365 to initiate emails, schedule meetings, and create tasks directly from client and matter records.

✓ Reimagine Microsoft Teams

Transform Teams into a hub for legal collaboration by creating channels linked to specific matters or clients.



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Enterprise Relationship Management



Automatically Keep Contacts Up to Date and Accurate

Applies Azure Open AI to capture and present contact data from inbound emails.



Understand Relationship Strengths

Automatically score engagement and relationships between your firm and clients, and your people and contacts.



Identify Opportunities & Risks

Proactively address deteriorating relationships and understand when contacts and accounts with key clients need to be expanded.

Why firms choose Foundation 365



Legal Sector Expertise



Attorney-friendly Design



Optimized of Marketing and BD



Exclusive Microsoft Cloud Integration



Simple Customization



Holistic Client Insight with Azure Integration

“What made Foundation 365 stand out was the simplicity of the software and how our lawyers can easily access it while they are working in Outlook, Teams, or via the web app while at their desks, or on their mobiles.”

Chair and Partner, Womble Bond Dickinson

For a closer look, visit www.litera.com or [request a demo](#).