



FOUNDATION
365

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

The CRM born in legal, built on Microsoft.



Modern UI purpose-built
for law firms



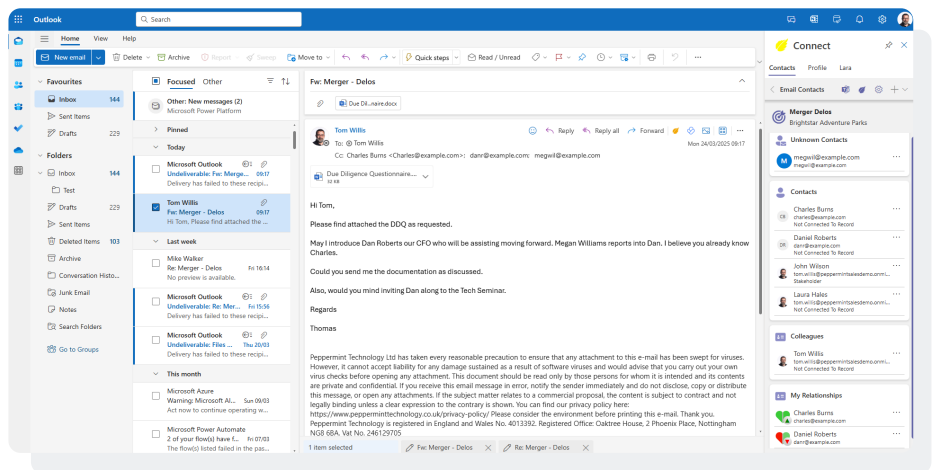
360-degree client view
on any device



Seamlessly integrated
into Outlook, Teams, and
Litera One



Highly flexible, enabling
you to start fast and
scale forever



Meet lawyers where they work

No more switching between multiple screens.

Access all relationship data and functionality in Teams and Outlook.

✓ Reduce Context Switching

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

✓ Drive Firm Growth

Turn client data into opportunity. Cross-sell strategically with LinkedIn-powered insights, route leads to the right teams automatically, and let your own data surface the growth that's already there.

✓ Accelerate Productivity

Leverage AI-powered relationship intelligence to initiate emails, schedule meetings, and create tasks directly from client and matter records.

✓ Anywhere You Work

Client relationships don't pause when you leave your desk. Foundation 365 on mobile puts every client engagement, contact, and opportunity directly in your pocket, no matter where the conversation is happening.



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Enterprise Relationship Management (ERM)



Automatically Keep Contacts Up to Date

AI analyzes your CRM and communication history to keep your contacts current so your outreach starts with accuracy, not errors.



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.

CRM + ERM = Complete view of your relationships

“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

Why firms choose Foundation 365



Expertise Earned
Over 30 Years



Attorney-friendly
Design



Proactive Marketing
and BD



AI Surfaced
Relationship Intelligence



Simple
Configuration



Holistic Client Insight
with Integrations

For a closer look, visit litera.com or scan the QR code to request a demo.

