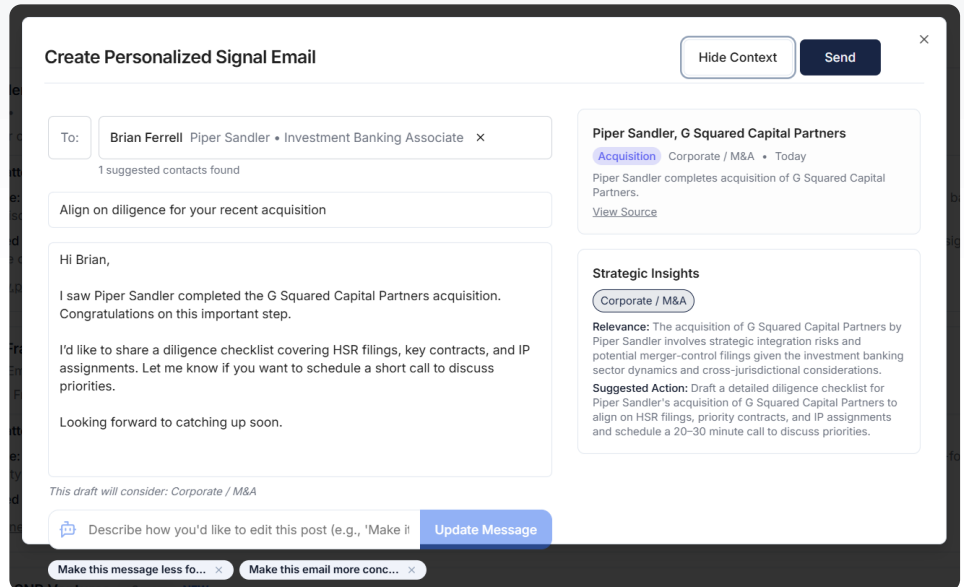


# Relationship Intelligence that Wins More Matters



Foundation Proactive, powered by Postilize, gives law firms the ability to act, not react. By combining AI-powered **Signals**, continuous **CRM Cleanse**, and dynamic **Relationship Intelligence**, firms can retain key clients, uncover cross-sell opportunities, and win new matters before other firms even know they exist.

## Proactive Relationship Management

Foundation Proactive delivers a smarter way to manage and grow client relationships:



### Signals

AI detects market and client events (executive moves, financings, new hires etc.) and turns them into actionable outreach.



### ERM

Tracks, scores, and strengthens relationships across the firm with proactive "keep-in-touch" reminders.




### Cleanse


Continuously detects changes and updates contact records, so CRM data stays accurate and revenue-ready.


## Key Capabilities


- Client Intent Signals**  
 Detect market events and instantly map them to legal opportunities.
- Automated Outreach**  
 Drafts in each lawyer's authentic tone, delivered via Outlook with one-click approval.
- Relationship Strength Tracking**  
 Measures frequency, recency, and quality of interactions.
- Continuous Data Hygiene**  
 Cleans, enriches, and archives CRM contacts automatically without any spreadsheets.
- Smart Archiving & Data Hygiene**  
 Archive stale contacts, preserve key relationships, and maintain a transparent audit trail.
- Integrated in Outlook**  
 Lawyers work where they already live, with no context switching.


## Business Outcomes

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**Client Retention**  
Stay top-of-mind before competitors move in.
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**Cross-Sell Uptick**  
Spot and act on multi-practice opportunities.
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**New Client Wins**  
Be first to engage when prospects signal legal need.
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**Matter Growth**  
Expand wallet share by catching new mandates early.
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**Operational Efficiency**  
Eliminate manual CRM cleanup and wasted research.

**Keep in Touch - Vincent Cordo** ✕

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How often would you like a reminder to reach out?

Never

Every 2 weeks

Once a month

Every quarter

Twice a year

Once a year

When it's time to reach out, what would you like to do?

Draft Email

Create Signal

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What type of events would you like to track alongside your keep-in-touch flow? (Optional)

Business generation events	Social engagement events
<input checked="" type="checkbox"/> <b>Company Acquisition</b> <small>When their company is acquired or acquires another</small>	<input type="checkbox"/> <b>Auto-like</b> <small>Like their posts to stay engaged and visible.</small>
<input checked="" type="checkbox"/> <b>Company Funding</b> <small>When their company raises funding</small>	<input type="checkbox"/> <b>Auto-reshare</b> <small>Reshare their posts to amplify visibility and build goodwill.</small>
<input checked="" type="checkbox"/> <b>Job Change</b> <small>When they start a new role or company</small>	<input type="checkbox"/> <b>Draft Comment on Post</b> <small>Generate a suggested comment for their post for your review.</small>
<input checked="" type="checkbox"/> <b>Job Promotion</b> <small>Congratulate career advancement</small>	
<input checked="" type="checkbox"/> <b>New Certification</b> <small>Celebrate professional development</small>	

Cancel
Save

For a closer look, visit [litera.com](https://litera.com) or scan the QR code to request a demo.

