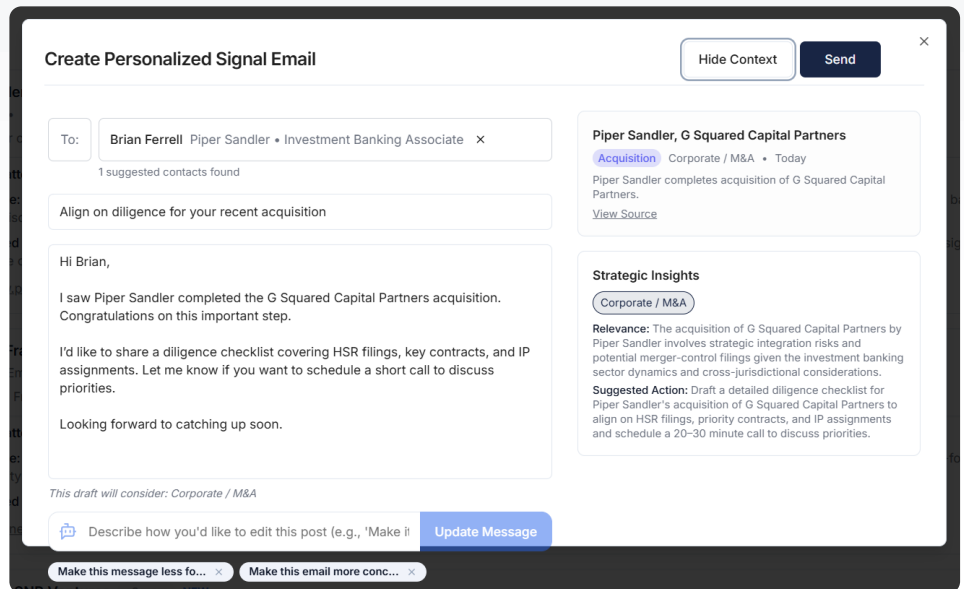


Relationship Intelligence that Wins More Matters



Foundation Proactive 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.



FOUNDATION
Proactive

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

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

Keep in Touch - Vincent Cordo

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

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

Business generation events

☒  **Company Acquisition**
When their company is acquired or acquires another

☒  **Company Funding**
When their company raises funding

☒  **Job Change**
When they start a new role or company

☒  **Job Promotion**
Congratulate career advancement

☒  **New Certification**
Celebrate professional development

Social engagement events

☐  **Auto-like**
Like their posts to stay engaged and visible.

☐  **Auto-reshare**
Reshare their posts to amplify visibility and build goodwill.

☐  **Draft Comment on Post**
Generate a suggested comment for their post for your review.

Cancel

Save

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

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