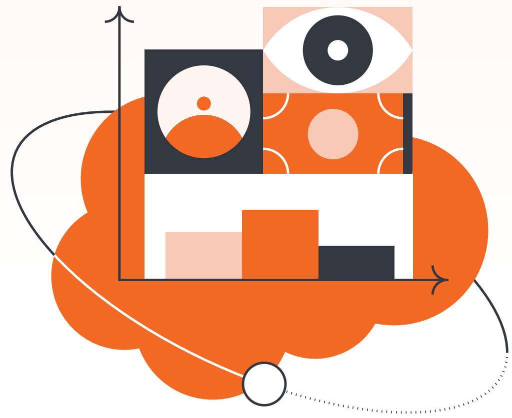
LITERA
Upper Sigma

The CRM purpose-built for law firms (powered by Salesforce)



Upper Sigma is pre-built to provide a 360° view of your clients and relationships. It's easily accessible via Outlook, Teams, and mobile, requires almost no data entry, and has the flexibility to fit your firm and your way of working.

- **Gain full insight** into your clients' and lawyers' relationships, email and meeting activities, marketing engagement, whitespace, and pipeline... plus everything else you expect from your CRM.
- **Minimize risk and uncertainty**. Upper Sigma has a proven track record of successful implementations for large law firms with no CRM downtime.
- **Access enterprise level security, scalability,** and pre-built integrations by taking advantage of the Salesforce platform – the world's number one CRM.

Pre-built for the way law firms work

Client 360° view. A complete and centralized view of your clients

Workflow automation. Help your teams work smarter by surfacing important insights and automating business processes

Open integrations. Pre-built integrations with best in class legal tools – whether from Litera, such as Foundation and Concep, or from other vendors

Enterprise security & scalability. Built on the Salesforce platform - the world's number one CRM

Automated data capture. Automatically capture contact, client, and activity data with almost no data entry needed

Accessibility. Upper Sigma meets you where you work, whether on mobile; panel; browser, Outlook, or Teams

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Best-in-class for all your marketing and business development needs

Client relationship management

Gain full transparency into who knows who and capitalize on your firm's relationships.

Event & list management

Easily build and update lists, manage events, and track everything.

Referrals management

Streamline the capturing of referrals, understand their source, and track all activity.

Whitespace analysis

Identify and prioritize opportunities to grow revenue by doing more of the work you're great at for clients you have strong relationships with.

Client planning

Standardize your approach to client and practice planning from within your CRM, helping you to proactively manage client retention and growth.

Reporting & dashboards

Track, analyze, and understand your pipeline and revenue generating activities to plan and forecast better.

Integrations with all your key tools