



InterAction® delivers meaningful customer intelligence and insight directly from Microsoft® Outlook® email, calendar and contacts.

InterAction® for Microsoft® Outlook®

Secure more business, strengthen personal relationships with your clients and manage clients across all touchpoints.

InterAction for Microsoft Outlook provides direct access to vital client data, including, contact information, mutual connections, upcoming meetings and personal notes – all while you're inside Microsoft Outlook email, calendars and contact lists. With this dynamic integration, InterAction for Microsoft Outlook is attorney-friendly and a marketer's dream.

InterAction for Microsoft Outlook

Leverage relationships to win new business

InterAction reveals firm relationships with clients of interest to you. If no direct relationship exists, InterAction uncovers intermediary contacts that might have a relationship with the selected prospect—say another firm contact that used to work with the prospect, or someone who sits on the same charitable board with the prospect. By revealing strategic relationships automatically and instantaneously, InterAction removes one of the most frustrating barriers a professional faces in leveraging the firm's internal network to win new business.

Eliminate missed opportunities

Now more than ever, it is critical to remain strongly engaged with clients and prospects. Personal relationships often make the difference between winning and losing. InterAction helps eliminate missed opportunities by revealing the strategic relationships that can make the difference between success and failure.

Manage clients effectively

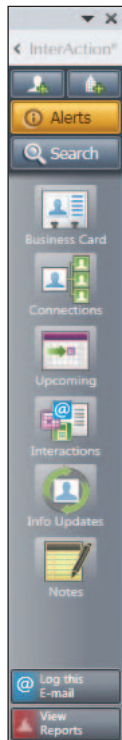
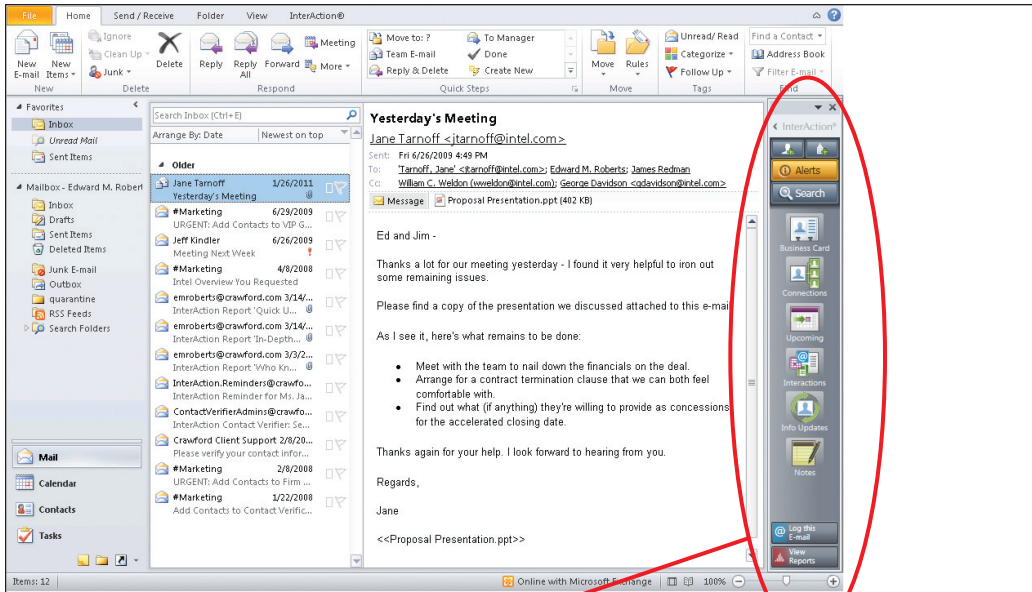
Client relationship management with InterAction provides you with a global snapshot of all firm interactions taking place with individual clients and contacts. This approach is especially important when multiple people within your firm interact with the same client. InterAction will automatically notify you when anyone in the firm has a meeting, phone conversation or correspondence with an important contact.



"InterAction for Microsoft Office is a game changer in my opinion. We're working toward a vision of using InterAction as a one-stop information port, helping attorneys understand as much as possible about contacts and opportunities. Attorneys can quickly see not just who knows their contacts, but also how much we've billed in the past, what kind of matters we've worked on and how large their clients' companies are."

Marketing and Business Development Director, Large Law Firm

InterAction for Microsoft Outlook



- ▶ Automatically stay up to date on what is happening with your key contacts.
- ▶ Receive Alerts when information changes for key contacts.
- ▶ Quickly search for contacts in your contact collection or in the firm's collection without leaving your inbox.
- ▶ View the contact information of all people included in an email.
- ▶ See the mutual connections of all people included in an email.
- ▶ View upcoming meetings for all people included in an email.
- ▶ Access contact information and view firm interactions with anyone included in an email.
- ▶ See any recent changes to the information of anyone included in an email.
- ▶ View personal and/or firm notes on anyone included in an email.
- ▶ Run a briefing report on a contact to quickly get up to speed before a meeting.

[Learn more](#)

www.InterAction.com

