

InterAction® for Microsoft® Outlook®

Ready access to customer intelligence and insight without leaving your email, calendar and contacts

More visibility and control over all your important relationship touchpoints

The dynamic integration between InterAction and Microsoft Outlook offers everything that a busy, relationship-focused professional needs to work with clients, prospect for new customers, and support the business development efforts that keep the firm growing.

With InterAction for Microsoft Outlook, you have a user-friendly and user-familiar way to access relationship details while working inside a normal Microsoft Outlook workflow. Client data, contact information, mutual connections, upcoming meetings and personal notes are just as accessible on the desktop as your everyday email, calendar and contact lists. That makes it easy to respond knowledgeably to emails, reference pertinent activities happening in the firm, or set up contact reminders to maintain the right amount of touchpoints with important clients.

Leverage relationship intelligence to win new business

With powerful “who knows whom” capabilities and connection information, InterAction reveals relationships already underway in your firm involving clients of interest to you. InterAction can even uncover intermediary connections, perhaps a firm contact who used to work with your prospect, or someone who sits on the same charitable board with that individual. By revealing these kinds of strategic relationships, InterAction removes one of the more frustrating barriers that professionals face in leveraging internal networks to win new business.

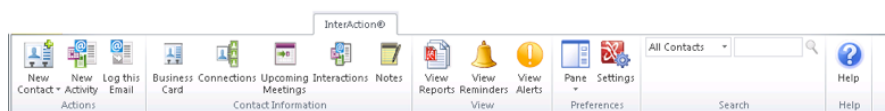
Manage client relationships and never miss another opportunity

Personal relationships often make the difference between winning and losing. InterAction's relationship management capabilities provide a broad snapshot covering the strategic relationships and the key interactions occurring within your firm; you won't overlook any opportunities as you keep in touch and stay engaged with clients and prospects.

InterAction can automatically notify you when someone in the firm has a meeting, phone conversation or corresponds with an important contact ... a valuable perspective to have when multiple people work with the same clients and contacts. Plus, the desktop integration between InterAction and Microsoft Outlook gives you additional ways to keep relationship insights and customer knowledge current.

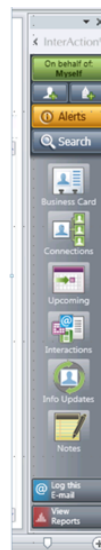
New capabilities increase user value

Periodic software updates put more capabilities and convenience within the easy reach of professionals. Recent enhancements have given users: flexibility to access InterAction features via a Ribbon menu at the top of the Outlook window, or through the standard side Panel display; active hyperlinks in Notes and Activities; and new options on Contact Search results that save time and effort.



Whether you rely on the InterAction Ribbon or Side Panel, users can stay in-the-know with easy feature access and automatic updates

- Receive Alerts when information changes for key contacts
- Search for firm-wide contacts without leaving your inbox
- Run a contact briefing report to prepare for a meeting
- View data for people in an email: contact details; mutual connections; upcoming meetings; firm interactions; recent changes to their information; and associated personal and firm notes



"InterAction for Microsoft Outlook 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

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