bizzomate

build an agile business

All relevant customer information in one overview

Each law firm records client information in several internal systems. Obtaining a complete client overview prior to a business meeting is crucial, but time-consuming. As a solution, a system has been built which collects information from various internal and external sources. Within one click, the client dashboard presents all relevant client data. In addition to the collected data the solution provides for account planning and monitoring.

Value

- ✓ Operational efficiency
    - ↳ Time-saving
- ✓ Insight and overview
- ✓ Increase customer satisfaction

How

- ✓ Aggregation for all client entities
- ✓ Mendix application
- ✓ Single sign-on
- ✓ Integration with internal core systems
- ✓ Integration with external systems
- ✓ Multi-device: mobile, tablet and web

Investment

- ✓ 4 weeks 2 FTE - version 1
- ✓ Continuous development

Connections

- ✓ SSR
- ✓ Elite (ERP)
- ✓ WorkSite (DMS)
- ✓ InterAction (CRM)
- ✓ CompanyInfo
- ✓ Howards Home
- ✓ LDAP

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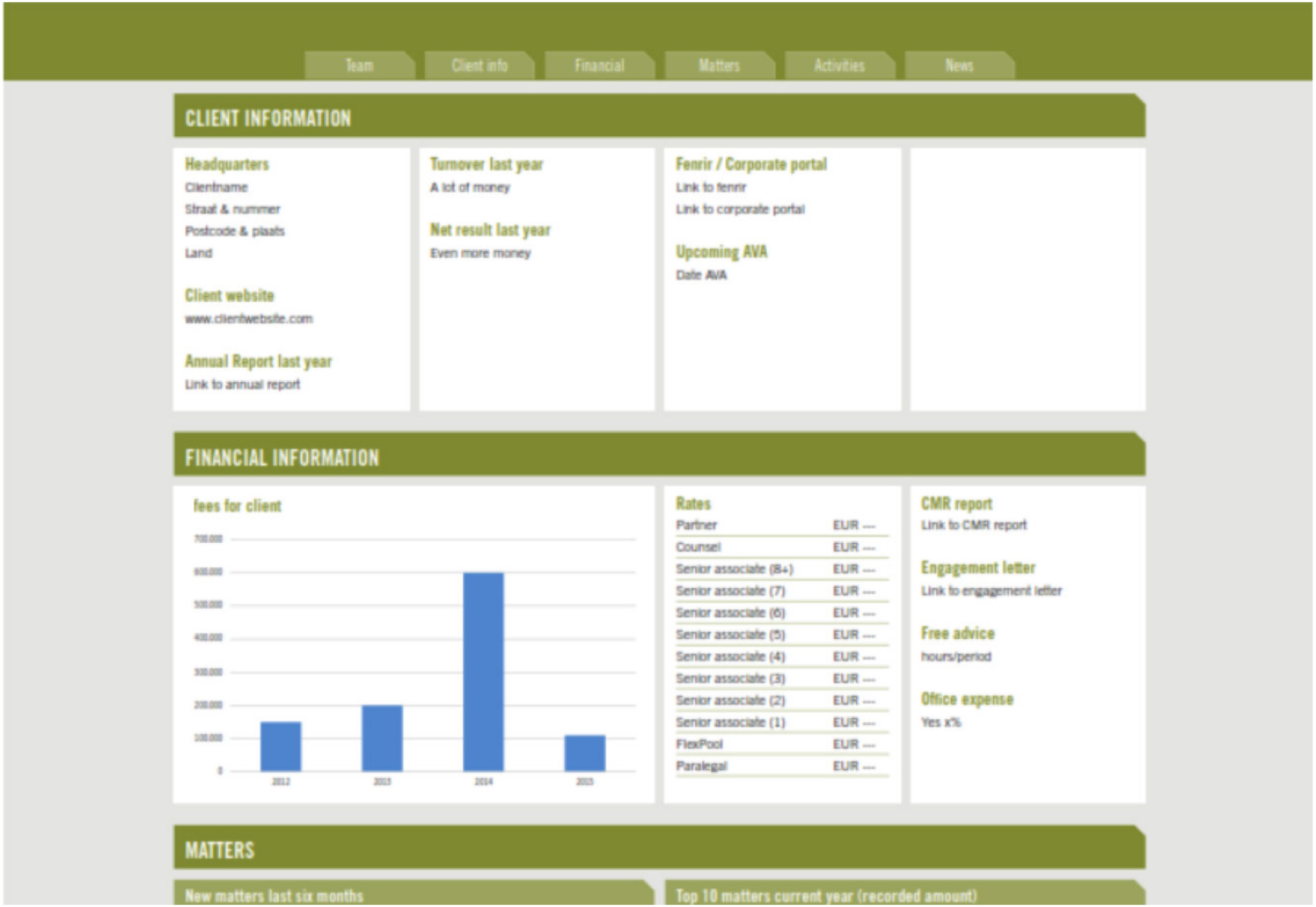
Team
Client info
Financial
Matters
Activities
News
CLIENT INFORMATION
Headquarters
Clientname
Straat & nummer
Postcode & plaats
Land
Client website
www.clientwebsite.com
Annual Report last year
Link to annual report
Turnover last year
A lot of money
Net result last year
Even more money
Fenrir / Corporate portal
Link to fenrir
Link to corporate portal
Upcoming AVA
Date AVA
FINANCIAL INFORMATION
fees for client
700.000
600.000
500.000
400.000
300.000
200.000
100.000
0
2012
2013
2014
Rates
Partner EUR ---
Counsel EUR ---
Senior associate (8+) EUR ---
Senior associate (7) EUR ---
Senior associate (6) EUR ---
Senior associate (5) EUR ---
Senior associate (4) EUR ---
Senior associate (3) EUR ---
Senior associate (2) EUR ---
Senior associate (1) EUR ---
FlexPool EUR ---
Paralegal EUR ---
CMR report
Link to CMR report
Engagement letter
Link to engagement letter
Free advice
hours/period
Office expense
Yes x%
MATTERS
New matters last six months
Top 10 matters current year (recorded amount)