



# Cognito InTouch

**An Integrated Solution for Marketing Legal Services**  
*An effective marketing tool for projecting legal practices' services to the right clients at the right time*

## Marketing Functionality Including:

- Sorting contacts using the desired criteria
- Production of correspondence linked to existing contact detail
- Reminders for follow-up activity
- Client campaign review and update
- Optional Time Recording during document creation

## Marketing Legal Services

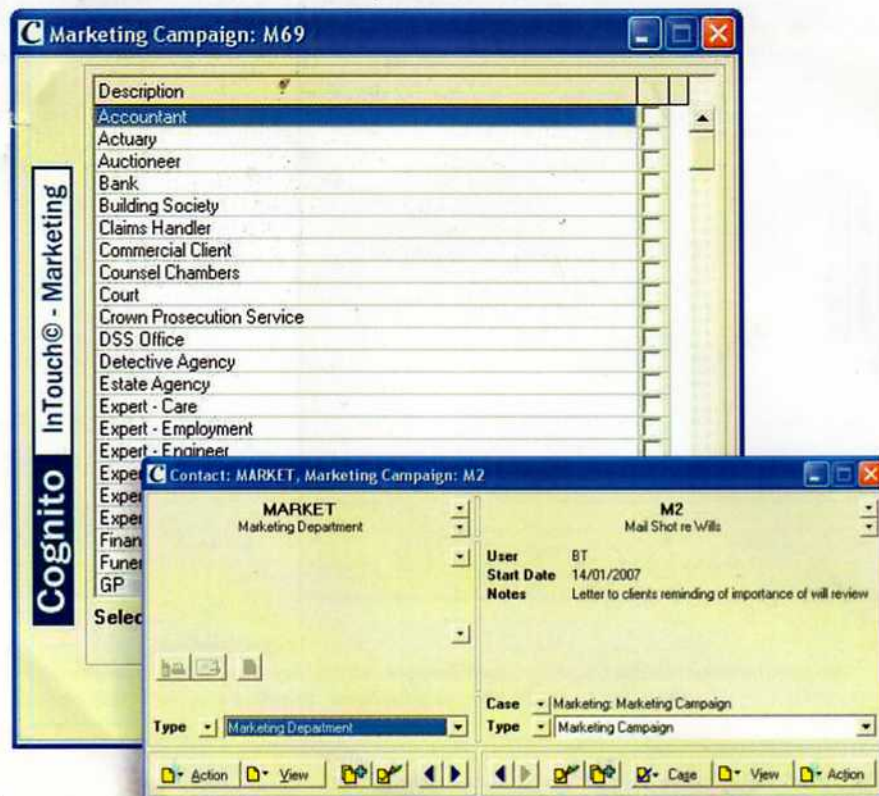
Cognito InTouch brings simplicity in executing marketing campaigns within the legal practice, monitoring success and taking follow-up action to generate business.

Available as an additional enhancement to the CaseManager suite of law modules; Cognito InTouch gives users the freedom to develop a system which goes further in reaching client specific circumstances and needs.

## Client Communication

Using the existing database, InTouch enables users to produce mailshots or other forms of communication in order to inform their clients of issues relating to their business.

Any kind of client contact can be used e.g. Estate Agent, Mortgagee, Ex-Client, alongside typical related fields such as full postal address, telephone number, email address, date of birth, marital status and occupation. InTouch enables these fields and any others to be used for searching and selecting specific targets for a campaign.



Integrated Solutions for Solicitors

# InTouch

## Simple Search and Selection

InTouch enables user definable searches to be made. This ensures that the right contacts are informed about services available to them by the practice.

When a search is initiated, InTouch uses the Database Information Retrieval feature to interrogate the database. Specific information can be retrieved through a number of easy to access screens. Users can select and remove fields at any time before the final results list is produced.

Once the list of client contacts and their attributes is completed, InTouch automatically creates a new case for activities to be recorded. Outstanding actions can be reviewed and progressed accordingly.

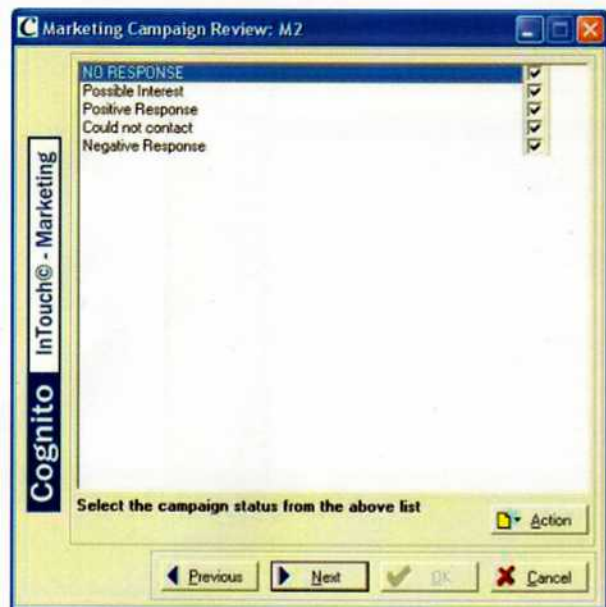
## Monitoring Progress

Once clients have been selected, a case is automatically created and attached to the contact details. This enables a record to be kept of activity that has been undertaken for each contact.

Standard campaign response types are assigned to cases by InTouch including:

- 'No Response'
- 'Could not Contact'
- 'Possible Interest'
- 'Negative Response'

In addition to standard responses, user definable response types can also be created for campaign evaluation purposes.



## Effective Targeting

Client contacts can be targeted by either email or letter correspondence. Communication types can include: client care letters, newsletters and Christmas cards.

Letter templates within the database can be used for mail merges. Four standard blank templates are provided within InTouch which contain: client name, address, letter date, salutation, free text area and signature block of the user.

Templates generated are saved to the Document Storage area of each case. Details of the user who created the letter and date are also recorded.

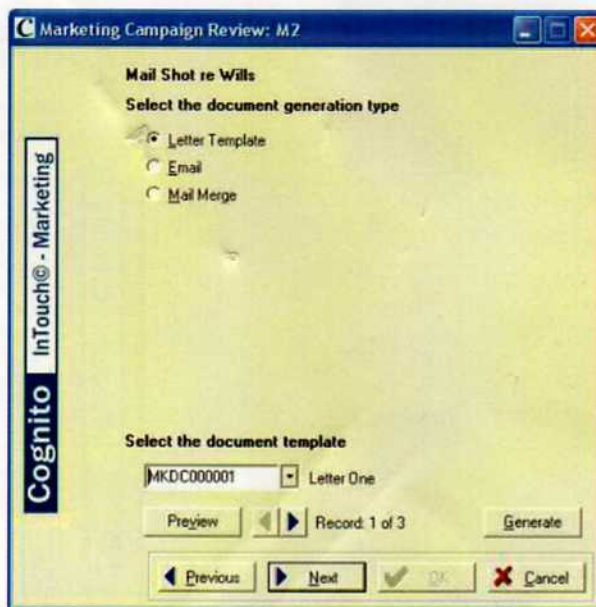
## Effective Campaigns

InTouch enables practices to be proactive in offering services, by identifying their clients' needs from previous business.

An example of where opportunities can be realised is where a Wills update enquiry can be triggered on completion of a conveyance; or an invitation to consider transfer of equity following a Decree Absolute.

Client records that might otherwise become dormant can turn into business through regular contact. This ensures full use of the client database and maximises business potential.

Cognito InTouch brings simplicity in executing marketing campaigns, monitoring success and taking follow-up up action to generate business.



## Cognito InTouch

*"An enhancement to the Cognito CaseManager suite of law modules which also includes: block contracting, conveyancing, debt collection, employment, family, personal injury and trust & probate"*

### SALES & MARKETING

Akhter House, Perry Road, Harlow, Essex. CM18 7PN  
Tel: 01279 821400 Fax: 01279 821300 Email: [info@cognitosoftware.co.uk](mailto:info@cognitosoftware.co.uk)

### DEVELOPMENT & SUPPORT

Cognito House, Fordton Trading Estate, Crediton, Devon. EX17 3BZ  
Tel: 01363 771044 Fax: 01363 773952 Email: [support@cognitosoftware.co.uk](mailto:support@cognitosoftware.co.uk)

[www.cognitosoftware.co.uk](http://www.cognitosoftware.co.uk)

