

**Understand key relationships and who
knows who more easily than ever before**

Collaboration Alert & Key Client Alert **by Promptr[®]**

Find out more: simon@promptr.co.uk | www.promptr.co.uk/collaboration-alert



Collaborating firms win more work. FACT
You can now choose to make it effortless

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Key Clients expect you to know about them
**Our key client alert enables your left hand to
know what your right hand is doing**

**Want to understand who is dealing with who
but don't want big database costs & effort?
Imagine 99% confidence of who-knows-who,
but at 5% of the cost and 1% of the effort**

**CRM databases are useless if nobody logs
“I met...” or “I know them...”**

**Understand key relationships without
lifting a finger of effort in CRM chores**

Our alerts leapfrog typical objections, like

- “I’m too busy to use our CRM”*
- “I won’t share my relationships”*
- “I know my client, I don’t need CRM”*

Do you keep seeing “*who has been dealing with...*” round-robin emails?
Our tech removes these headaches

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Some lawyers are great at BD
Our automated alerts help the others

Find out more: simon@promptr.co.uk | www.promptr.co.uk/collaboration-alert



How the Promptr[®] Collaboration Alert works



You tell us which 100 email domains to track (plus which fee earner emails to track + alert)



Everyone keeps doing what they do best



Your firm's daily Outlook in/out emails and meetings pass through the Promptr Software.



Fee earners receive a weekly alert about:
1) WHO corresponds with & meets who
2) WHO knows who
3) TIPS to use the info



Go armed to meetings with a pre-meeting alert



Anyone can lookup contacts to see info & record their BD

How the Promptr[®] Key Client Alert works



You tell us which key client domain and it's variations to track (and your fee earner emails to track + alert)



Everyone keeps doing what they do best



Your firm's daily Outlook in/out emails and meetings pass through the Promptr Software.



Fee earners receive a weekly alert about:
1) WHO corresponds with & meets who
2) WHO knows who
3) TIPS to use the info +
BD & Marketing receive a monthly overview of the Client



Go armed to meetings with a pre-meeting alert



Anyone can lookup contacts to see info & record their BD

Pricing

Collaboration Alert

(included in Promptr's CRM software bundle)

Setup: £750 (+VAT)

Monthly bands:

1-100 tracked staff: £250/month (+VAT)

101-200 tracked staff: £325/month (+VAT)

201-300 tracked staff: £375/month (+VAT)

301-400 tracked staff: £400/month (+VAT)

401+ POA

Key Client Alert

50% off if you already buy our CRM software

Setup: £500 (+VAT)

Monthly bands:

1-500 tracked staff: £50/month (+VAT)

501 - 1,000 tracked staff: £100/month (+VAT)

1,001+ POA

Other Services: P.O.A.

FAQs...

Do we need to have a CRM system?

No. The only criteria is that you have Microsoft Office (any version).

Do we need to give you the contacts we want to track?

No. You can if you want to start faster. Just give us the email domains to track, and the software will create the contacts and your activity with them.

How many key contacts can we track?

You can track 100 domains, plus the variations on them (e.g. promptr.co.uk & promptr.com). So you can monitor any number of contacts at your key clients without the clutter of unimportant contacts.

How quick can we get up and running?

The moment you sign, we'll set you up and you'll be up and running within a few working days.

How does it track and create contacts?

Our software tracks your inbound & outbound emails & meetings with contacts at the tracked domains. It creates the contacts (from the Outlook header record) and adds fee-earners who email them as knowing them & records the amount of emails and meeting with them (and by whom).

What alerts do we see?

Your fee-earners receive a personalised alert each week, summarising the activity with their contacts. When that fee-earner has a meeting with a tracked contact, they receive a briefing email about the person they are meeting, PLUS an overview of their firm. A link is in all alerts to a mini-CRM-database so anyone can look-up the contacts, which enables you to specifically add details like "I had coffee with..." - IF you can get your fee-earners to add them!

Where is our data stored?

We don't store your email content. Your emails pass by the Promptr software, which is on Microsoft Azure encrypted servers - just like your Office 365 servers. These are held on UK servers for UK clients.

Who can see our email content?

No person sees the content of your emails. The employees and sub-contractors of Promptr Limited can see the contact's details in the software because we check they have come in correctly.

Find out more: simon@promptr.co.uk | www.promptr.co.uk/cross-selling-alert



Is it time to make your BD & CRM effortless?



Referrer Network Alert

How would you know if your work introducers are falling through gaps? Keep on top of your referral networks more easily than ever before. It doesn't matter which CRM you currently have, if at all. **Prices from £100/month**



Collaboration & Relationship Alert

Effortlessly understand all your key relationships and see who-knows-who without the usual CRM database headaches. Spend your time doing what you do best, not on database chores. No CRM database needed. **Prices from £250/month**



Key Client Alert

Need a one-firm overview of who-knows-who and who is emailing or meeting contacts at key clients? Want a heads-up before meeting the client? This shows you, without anyone lifting a finger of effort. **Prices from £50/month, multi-purchase discounts.**



Cross-Selling Alert

All your lawyers great at introducing colleagues? Imagine marketing receiving an alert when 'Employment law' keywords appear in an incoming email (that isn't sent to anyone in your Employment team). **Prices from £50/month, multi-purchase discounts.**



Sentiment & Client Listening Alert

How would you know if lawyers received an email with words in it that should worry you? Your Marketing / Practice Manager / Compliance Officer can now have an alert the moment it happens (or you can track nice words). **Prices from £50/month**



Promptr CRM, a fully managed CRM service

Need to understand your relationships and see who know who? Without lifting a finger of effort or doing database chores? Our fully managed CRM service (+ software) is what you'll be looking for. **Prices from £850/month**

Find out more: simon@promptr.co.uk | www.promptr.co.uk/cross-selling-alert



Spend your time doing what you do best
Not worrying if teams can collaborate easily

Book a meeting: calendly.com/promptr
Email us: simon@promptr.co.uk
Find out more: promptr.co.uk/collaboration-alert