



**ALLRIZE**<sup>TM</sup>

Powered by Microsoft technology

# AllRize CRM

Capture Engagement.  
Nurture Trust.  
Enhance Client Relationships.





## Introduction

For many law firms, client intake is one of the most critical yet chronically inefficient parts of the business. Attorneys and staff often rely on a mix of manual forms, scattered spreadsheets, sticky notes, and disconnected email threads to capture and track prospective clients. This fragmented approach creates bottlenecks, forces repetitive data entry, and increases the risk of errors or incomplete information.

Leads can sit unanswered for days, follow-ups may be inconsistent or forgotten entirely, and valuable opportunities can quietly disappear. Even when a potential client is engaged, details may be lost between team members or across communication channels—hurting both conversion rates and client satisfaction.

The CRM module of the AllRize Practice Management System changes that. Purpose-built for law firms, our AI-powered CRM module centralizes every client interaction—from the very first inquiry to long-term relationship management—within a single, secure system. Integrated seamlessly with Microsoft Dynamics 365, it eliminates inefficiencies, ensures no lead falls through the cracks, and frees your team to focus on building strong, lasting client relationships.



## Key Features



### Streamlined Client Intake

Quickly capture, qualify, and convert prospects into clients with automated intake workflows.



### Unified Contact & Communication Management

Store and organize all client data—contacts, case history, notes, and communications—in one easy-to-access location.



### Automated, Personalized Follow-Ups

Schedule and send tailored updates, reminders, and check-ins via email or SMS, ensuring no client is overlooked.



### Built-In Analytics & Reporting

Monitor lead conversion rates, client engagement trends, and team response times to continually improve performance.



## How It Works



### Unified Dashboard

Access all client and prospect information in one view—whether you're in the office, at court, or working remotely.



### AI-Driven Insights

Automatically identify high-value leads, suggest follow-up actions, and prioritize outreach based on engagement patterns.



### Microsoft Dynamics 365 Integration

Leverage a familiar, secure environment that works seamlessly with Outlook, Teams, and other productivity tools—minimizing training and maximizing adoption.



## Benefits for Law Firms



### Better Client Service

Consistent, timely communication strengthens trust and improves satisfaction.



### Higher Conversion Rates

Turn more prospects into clients through structured, responsive intake processes.



### Stronger Retention

Maintain relationships that encourage repeat business and referrals.



### Data-Driven Decisions

Make smarter marketing and client service choices with actionable analytics.



## Works Alone or as Part of the AllRize Suite

AllRize CRM is powerful – and can be quickly deployed on its own – but it becomes even more impactful when combined with other AllRize modules—Matter Management, Marketing, Document Management, and Accounting—for a fully integrated law practice management system. But the architecture of the AllRize platform allows you to deploy only what you need, when you need it.

### Get Started Today

Experience how AllRize CRM can help your firm capture more opportunities, deliver exceptional client service, and grow revenue—without adding administrative burden.

Visit [allrize.ai](https://allrize.ai) to learn more, or schedule a brief demo using the link below.

[SCHEDULE A DEMO](#)