



Keep InterAction Healthy

Lexis® InterAction® Health Check

Business continuously evolves – organisation restructures, new legislation, changing client demands, increased competition and changes in personnel. Faced with these changes, your Client Relationship Management (CRM) system configuration needs to continually evolve, so it's important to take a regular look at your approach and system to ensure continued project success and to gain the most value from your investment.

LexisNexis Enterprise Solutions can help you evaluate the configuration effectiveness of your Lexis InterAction solution. A number of health check services are available to examine different aspects of your solution in line with best practice in your sector.

Your InterAction health check will be carried out by an experienced InterAction consultant with in-depth knowledge of your sector. The analysis and investigation can be carried out on-site or remotely.

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InterAction Core System Health Check: 2 Days

Review: We will work with you to understand your current business objectives, performance targets, process aims and user adoption goals.

Diagnosis: We will carry out a review and analysis of the central configuration aspects of your core InterAction system against your objectives and CRM best practice. These include:

- Analysis of Contact Types
- Analysis of Relationships
- Analysis of Activity Types
- Analysis of Tickets
- Analysis of Additional Fields
- Analysis of Processes
- Analysis of Marketing Lists
- Analysis of Contact Contribution across userbase

Prescription: We will produce a comprehensive InterAction Health Check Report that details our findings, highlights what is going well and identifies any areas for configuration improvement, training or strategy developments that will increase value from your system and enhance user adoption. It includes a prioritised list of practical recommendations to help you achieve quick wins as well as a roadmap for getting the most from your system over the long term. We will visit you to present the findings and discuss any questions you may have.

Aftercare: Your LexisNexis Client Advisor can help you turn these recommendations into a specific action plan for your firm.

It includes a prioritised list of practical recommendations to help you achieve quick wins as well as a roadmap for getting the most from your system over the long term.

Additional Health Check Services

Data Quality Health Check: +1 Day

This service aims to tell you how well data is being populated within your InterAction system and how effectively the data change management process is working. It will identify any specific areas of focus for improvement of data quality. The analysis into contact data quality includes:

- Analysis of data completeness within contacts residing in 2 Contact Types
- Analysis of duplicate contacts
- Analysis of Data Change Management Rule Sets and Collections

Application Collaboration Health Check: +2 Days

This health check examines the Application Collaboration toolset, to verify your data integration services to the InterAction system are working as expected and whether errors are being dealt with effectively.



Additional Health Check Services - Continued

This service includes analysing and evaluating the following elements:

- Errors over time per dataset (subject to data availability)
- Analysis of the last transformation
- An analysis of redundant fields
- Set up and use of Application Collaboration

Please note the analysis does not look at the harvesting of data from source systems.

Matters, Opportunities and Engagements Health Check: +1 Day (up to 2 Modules)

This service reviews the configuration of Matters, Opportunities or Engagement modules to ensure alignment with your firm's strategy. From our best practice experience we will advise on any enhancements required to help improve usability, design and security. This health check includes:

- Analysis of the usage of fields and roles
- The percentage of Matters, Opportunities or Engagements that have incomplete information at closure
- Evaluation of the module in relation to business strategy and usage
- Analysis of outputs from Matters, Opportunities or Engagements

Tikit eMarketing Health Check: +1Day

The Tikit eMarketing Health Check ensures your eMarketing tool works with InterAction in line with recommended standards and best practices, to create the best possible experience for users and clients.

This health check includes:

- Analysis of eMarketing configuration
 - eMerge
 - Sender Options
 - Categories
 - Security Analysis
 - Templates Analysis

Exclusion Folders (InterAction & Templates)

- ReAction Server
 - Token Analysis
 - Template Analysis (HTML)
 - Form Analysis (ReAction basic forms in place)
- Technical
- Review of Log Files
- Version/patch updates

Contact Us >

Lexis®InterAction®

For more information

To find out more about Lexis®InterAction® and to discuss your company's specific business requirements, please visit: www.lexisnexis-es.co.uk/interaction

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