

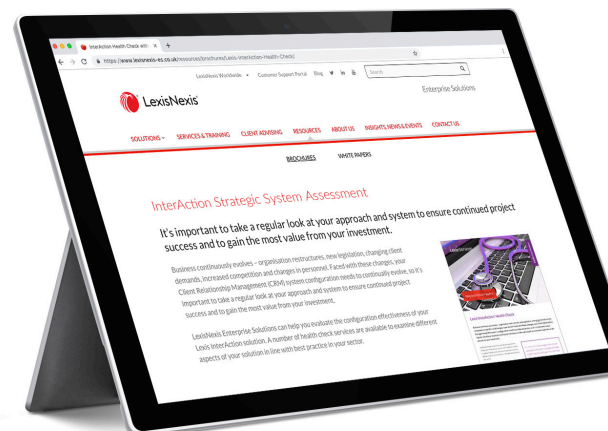
# InterAction® Strategic System Assessment

## Keep InterAction healthy

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 can help you evaluate the configuration effectiveness of your InterAction solution. A number of strategic system assessment services are available to examine different aspects of your solution in line with best practice in your sector. Your InterAction strategic system assessment 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.



## InterAction Core System Strategic System

### Assessment: 3 Days

**Appointment:** We will work with you to understand your current business objectives, performance targets, process aims and user adoption goals. We will do this via an initial questionnaire and meeting to discuss your objectives.

**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 Additional Fields
- Analysis of Activity Types
- Analysis of Relationships
- Analysis of configuration to support BD processes
- Analysis of Marketing List and subscription processes
- Analysis of Contact contribution across userbase
- Analysis of key Data Quality metrics
- Review of Data Minder configuration (if applicable)
- Review of IQ configuration (if applicable)

**Prescription:** We will produce a comprehensive InterAction Strategic System Assessment 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 can 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.

## Application Collaboration Strategic System

### Assessment: +1 Days

This strategic system assessment 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. This service includes analysing and evaluating the following elements:

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

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

## Matters, Opportunities and Engagements Strategic System

### Assessment: +1 Day (per Module)

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 strategic system assessment 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

## For more information

To find out more about InterAction® Strategic System Assessment services and to discuss your firm's specific business requirements, please speak to your **LexisNexis Account Manager, Client Advisor** or visit [www.lexisnexis-es.co.uk/contact-us](http://www.lexisnexis-es.co.uk/contact-us)