

# Client Engagement

IS THE NEW CRM



## Born on legal Built on Microsoft

Peppermint Client Engagement is a modern and innovative business development and marketing solution built on Microsoft Cloud. Forget CRM, it's time to talk about Client Engagement.

## Form meets function

Peppermint Client Engagement features include:

- ✓ Built on Microsoft Cloud
- ✓ Exclusively for legal
- ✓ Extension of Outlook and Teams
- ✓ Mobile app
- ✓ Whitespace analysis
- ✓ Role-based dashboards
- ✓ Event management
- ✓ Powerful workflow tools
- ✓ Intuitive user interface
- ✓ Referral management
- ✓ Campaign ROI
- ✓ Expertise and experience
- ✓ Customer feedback
- ✓ Client portal
- ✓ LinkedIn integration
- ✓ Data management tools
- ✓ Power BI reporting
- ✓ Highly configurable



### Attorneys and partners

Focus on strengthening and developing relationships with key referrers, and manage outbound referrals.



### Business development

Identify new business leads and provide a timely and bespoke response to the prospective client.

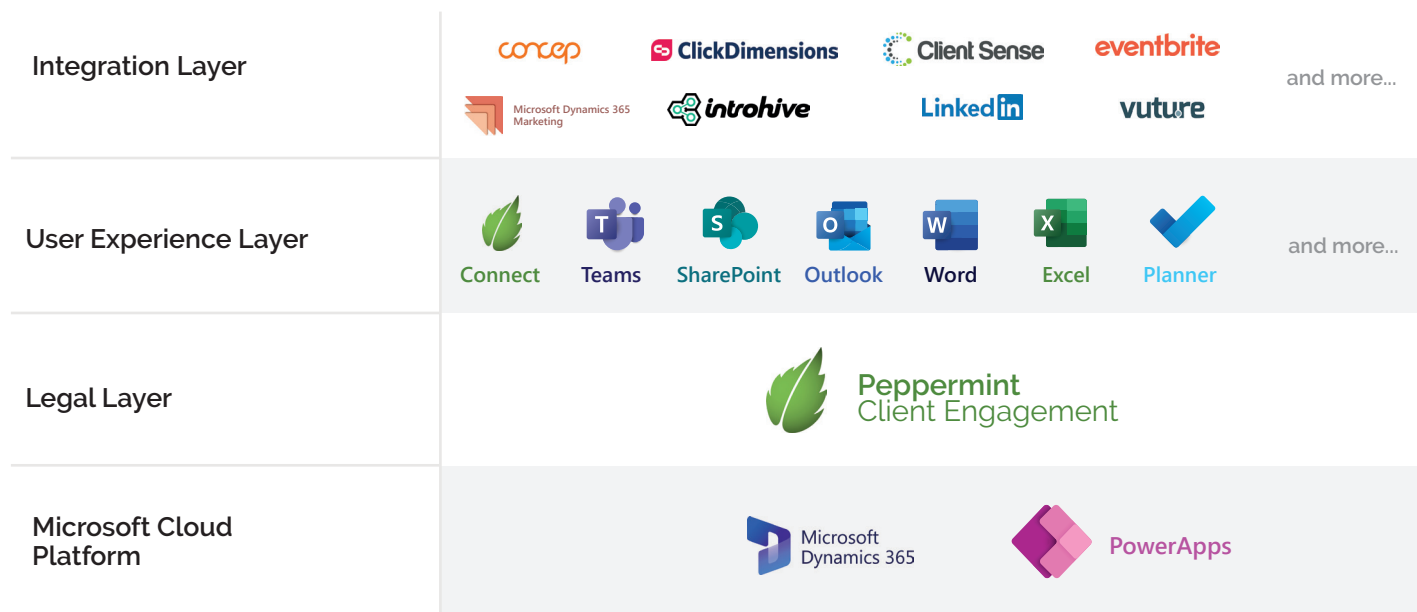
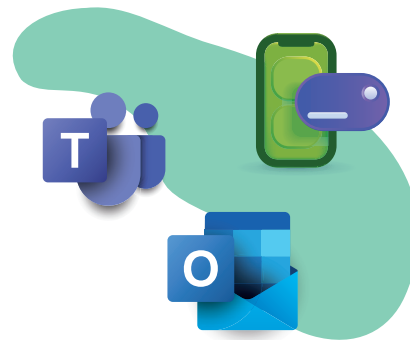


### Marketing

Be confident that marketing lists are targeted and include only those with appropriate consent.

# Our tech stack

Our solution is a legal layer built on the Microsoft Power Platform and Microsoft Dynamics 365. This means Peppermint Client Engagement seamlessly fits into the Microsoft 365 ecosystem, extending **Outlook, Teams, and smart phones** with apps to enable access to Peppermint anytime, from any place, using any device.



"We were seeking a new CRM solution that would help us think ahead, anticipate business trends, and plan for challenges as we work alongside our clients. Peppermint Client Engagement and Client Sense are ideally placed to equip us with the data we need to make decisions that help us meet those strategic objectives."

LESLIE NOAKES, MARKETING  
OPERATIONS DIRECTOR AT  
LATHROP GPM



"Peppermint's Client Engagement will help our attorneys enhance valuable relationships and provide a complete view of their clients. Peppermint's ability to natively integrate into our broader Microsoft 365 strategy was also a significant factor in our decision and perfectly complemented our digital-first approach."

MICHAEL KOLB, COO AT  
DICKINSON WRIGHT



"What made Peppermint stand out was the simplicity of the software and how our lawyers can easily access it while they are working in Outlook, Teams, or via the web app while at their desks, or on their mobiles"

NICK BARWOOD, UK CHAIR  
AND PARTNER AT WOMBLE  
BOND DICKINSON

## Book a demo today

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