

# Case Management Integration

A structured CRM platform that is integrated with a Case Management System can improve the efficiency of legal organisations. With **NimbusPoint**, we can standardise multiple types of processes from **Call Handlers** through to raising **Matters**, and enhance the end-user experience to consolidate multiple applications and provide a single source of truth.



Legal organisations typically face a number of challenges across their sector, including: having **no central CRM** to store new enquiries, **limited visibility** of new business enquiries and **case management** and **no single customer view** across the client base.

## Legal organisations are typically looking for:



Streamlined **Case Management** through **2-way Proclaim Integration**



**360°** view across Leads, Opportunities, Cases, Activities



A single point of truth with **real-time metrics**



**Improved** communications through **CTI Integration**

## Solution features:

- ✓ Customisable processes for handling new business enquiries
- ✓ Integration with **Proclaim Case Management™**
- ✓ Raise Matters from CRM into CMS
- ✓ 2-way sync with Proclaim™
- ✓ Management of multiple Case processes
- ✓ Manage Calls & Activities
- ✓ **CTI™** Integration for call tracking
- ✓ Case & Assignment Automation
- ✓ Complaint Handling
- ✓ Forecasting & Business Reporting
- ✓ Real-time Management Dashboards

To find out more information, call:  
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