Microsoft Dynamics 365 for Legal

d365Legal: Communications Plan



From proof of concept to pilot to firm-wide rollout — with sample communications for Marketing, Business Development, Fee Earners, Finance and Administration.

Prepared for the d365Legal Programme | September 2026

Why communications planning decides adoption

A CRM programme fails quietly — through non-use, not through outage

1

Technology lands, behaviour doesn't

Dynamics can be configured in weeks. Fee earners changing how they record a client conversation takes months of consistent messaging.

2

Five audiences, five different 'what's in it for me'

Marketing, BD, fee earners, finance and administration each judge d365Legal against their own daily workload.

3

Silence is filled by rumour

Without a cadence, 'they're tracking my billable behaviour' becomes the story. Explicit, repeated messaging prevents it.

4

Data quality is a communications problem

Outlook contacts only migrate well if people clean them — that is persuasion, not configuration.

Communications across three phases

Each phase has a different audience, promise and proof point

01

Proof of Concept

Weeks 1–4

Closed, invitation-only. ~10 people: programme sponsor, IT, one BD lead, two fee earners.

- Message: 'we are testing, nothing changes for you yet'
- Channel: 1:1 briefings and a short sponsor email
- Risk to manage: premature firm-wide rumour
- Proof point: a working demo on real firm data

02

Pilot

Weeks 5–8

One practice group plus Marketing, BD and Finance representatives — roughly 40 users.

- Message: 'you are shaping the system others will inherit'
- Channel: kick-off session, weekly digest, feedback channel
- Risk to manage: pilot fatigue and unanswered feedback
- Proof point: published 'you said, we changed' log

03

Firm-wide Rollout

Weeks 9–12

All partners and staff across every office and business services team.

- Message: 'this is now how the firm manages relationships'
- Channel: partner meeting, all-staff email, intranet, training
- Risk to manage: parallel use of old spreadsheets
- Proof point: go-live date, policy and support model

Five audiences, five messages

The same platform, framed against each group's own workload



Marketing

Campaign lists that are accurate, de-duplicated and consent-compliant — no more chasing spreadsheets before every seminar.



Business Development

One view of who in the firm knows whom, pipeline visibility on panel bids and pitch history in one place.



Fee Earners

Minimal keystrokes: relationships and contacts captured from Outlook, with credit for the introductions you make.



Finance

Reliable client and matter data flowing into billing and reporting, fewer manual reconciliations at month end.



Administration

Clean central data and defined ownership, so PA time goes to clients rather than maintaining private contact lists.

Communications cadence and channel plan

Who hears what, from whom, and how often

Phase	Audience	Channel	Frequency	Owner
Proof of concept	Sponsor group, IT, 5 nominated users	1:1 briefing, short email	Fortnightly	Programme Manager
Pilot kick-off	Pilot group (~40)	Live session + follow-up email pack	Once, then weekly digest	Project Lead
Pilot running	Pilot group, project team	Teams channel, 'you said we changed' note	Weekly	Change Lead
Pre-rollout	Partners and department heads	Partner meeting slot, briefing pack	Monthly	Sponsoring Partner
Rollout	All staff	All-staff email, intranet, floor walkers	Weekly for 6 weeks	Comms / Change Lead
Post go-live	All staff, practice groups	Adoption scorecard, tips email	Monthly for 6 months	Programme Manager

Sample: firm-wide introduction of the project

Email from the Managing Partner/CEO — sent at programme approval

From: Managing Partner To: All Partners and Staff
Subject: Introducing d365Legal — one view of our clients and contacts

Dear colleagues,

Our client relationships are the firm's most valuable asset, yet the information about them sits in Outlook folders, personal spreadsheets and individual memories. From today we are beginning a programme, d365Legal, to bring that information together in Microsoft Dynamics 365.

What this means in practice: Marketing will run seminar and campaign lists from accurate, consented data. Business Development will see our full relationship map and pitch history before a bid, not after. Fee earners will spend less time rebuilding contact lists and will get visible credit for the introductions they make. Finance will work from consistent client and matter data. Administration will maintain one central record instead of many private ones.

What it does not mean: d365Legal is not a monitoring tool. It does not measure individual billable performance, and it will not expose the content of your emails. Privileged and confidential matter information remains where it is today.

We will move deliberately: a proof of concept this month, a pilot with the Corporate group and business services from October, and a firm-wide rollout in December. You will hear from us regularly, and nothing changes for you until training is offered.

[Sponsoring Partner] is accountable for the programme and [Project Lead] is leading delivery. Questions are welcome at d365legal@firm.com.

With thanks, [Managing Partner/CEO]

Sample: introduction of the project to the pilot group

Email and kick-off invitation — sent two weeks before pilot start

From: Project Lead To: d365Legal Pilot Group
Subject: You're in the d365Legal pilot — here's what we need from you

Hello,

You have been asked to join the d365Legal pilot because your group works with clients and contacts every day. Ten of you — Corporate fee earners, Marketing, Business Development, Finance and PAs — will use the system first and decide what the firm inherits.

What we are asking for: attend the 60-minute kick-off on [date]; use d365Legal for your contacts, activities and opportunities for four weeks; and tell us plainly what is slow, confusing or missing.

What you get in return: first call on how the system is configured, a named support contact, and a published log of every change we make in response to your feedback.

This is a pilot, not a test of you. Nothing you record will be used in any performance conversation.

[Project Lead]

Pilot commitments

- 60-minute kick-off session
- Four weeks of daily use
- Weekly 15-minute feedback pulse
- One named super-user per team
- Fortnightly 'you said, we changed' log
- Exit review and go/no-go input

Success measure: 80% of the pilot group active weekly by week four.

Sample: introduction of the project to the project team

Briefing note at project team mobilisation

From: Sponsoring Partner To: d365Legal Project Team
Subject: Mobilising the d365Legal project team — scope, roles and rules of engagement

Team,

You are accountable for delivering d365Legal from proof of concept through to firm-wide adoption. Our objective is not a working system; it is a firm that uses one.

Scope for phase one: contact and relationship management, activity tracking, campaign and event management, pitch and opportunity tracking, with integrated practice management and billing data. Matter management and document integration are in/out of scope until phase two.

Rules of engagement: configure before you customise; every change request carries a named business owner; no data migrates without a nominated data steward signing it off; and we communicate on schedule even in weeks where there is nothing new to say.

We meet weekly on [day], with a steering report to the Board.

[Sponsoring Partner]

Core roles

Sponsoring Partner
Decisions, funding, partner airtime

Project Lead
Delivery, scope, supplier

Change & Comms Lead
Messaging, training, adoption

Data Steward
Migration rules, quality sign-off

CRM / BD / Practice Manager
Process design, super-users

IT Lead
Integration, security, support

Sample: preparing Outlook contacts and data for migration

Email to all staff — before pilot data load

From: CRM Manager To: All Partners and Staff
Subject: Action needed — preparing your Outlook contacts and other data for d365Legal

Dear colleagues,

d365Legal is only as good as the data we put into it. Between [date] and [date] we are asking everyone to spend 30 minutes tidying their Outlook contacts before migration.

Please: delete contacts you no longer recognise; complete company name, job title and email for the ones that matter; remove personal and family contacts, which will not be migrated; and flag any contact that is commercially sensitive using the category 'Do Not Migrate'.

What happens next: we de-duplicate and validate the combined file, match it against our client and matter records, and load it to d365Legal. From go-live, your Outlook stays synchronised — contacts and meetings you record are captured automatically, so there is no double entry. We track the relationship, not the content of your correspondence.

Drop-in clinics run daily at 12:30 in [room], and your PA has a one-page guide.

[CRM Manager]



Data migration ground rules

- No personal or family contacts migrate
- Duplicates merged, oldest record retained
- Consent status carried across for marketing
- Email content is not stored in Dynamics (TBD)
- Ethical walls respected at record level
- Data steward signs off each load

Sample: d365Legal system use policies

Short, enforceable rules published with go-live

Ownership

Every contact has a named relationship owner. If you introduced the client, you own the relationship record until you transfer it.

Timeliness

Client meetings, calls and new contacts are recorded within two working days. Outlook sync does most of this for you.

Single source

From go-live, private contact spreadsheets are retired. Marketing and BD will only run lists from d365Legal.

Privacy and consent

Marketing consent is recorded and respected. Opt-outs are honoured within 24 hours, firm-wide.

Confidentiality

No privileged or matter-sensitive detail in free-text notes. Ethical walls and client confidentiality rules apply exactly as elsewhere.

Access and conduct

Access is role-based and audited. Data is used for firm business only; exporting contacts on departure is a disciplinary matter.

Sample: d365Legal training plan

Role-based, short, and timed to the moment of need

Audience	Format	Duration	Timing	Content focus
Fee earners (partners & associates)	Floor-based small group, 8 per session	45 min	Week of go-live for their group	Outlook capture, finding who knows whom, logging a meeting in 30 seconds, time and billing
Business Development	Workshop + hands-on lab	Half day	Two weeks pre go-live	Pipeline, pitch tracking, relationship mapping, panel bid reporting
Marketing	Workshop + hands-on lab	Half day	Two weeks pre go-live	Segmentation, campaign and event management, consent and reporting
Finance	Focused session	90 min	Week of go-live	Client and matter data integrity, invoicing, revenue reporting from CRM data
Administration / PAs	Session + super-user stream	2 hours	Three weeks pre go-live	Data entry standards, contact maintenance, supporting fee earners
Super-users (2 per team)	Deep dive + monthly forum	1 day + monthly	Pilot phase onward	Full functionality, troubleshooting, local coaching
New joiners	Induction module	30 min	Week one of employment	Core use, policies, data standards

Reinforcement: weekly two-minute tip email for eight weeks after go-live, plus daily 15-minute drop-in clinics for the first month.

Sample: firm-wide update — preparing for go-live

All-staff email, three weeks before firm-wide launch

From: Sponsoring Partner To: All Partners and Staff
Subject: d365Legal goes live on [date] — what you need to do

Dear colleagues,

The d365Legal pilot finished last week. Your colleagues in Corporate, Marketing, BD, Finance and Administration used the system for four weeks. They logged 1,900 activities, merged 6,400 duplicate contacts, and asked for 23 changes — 19 of which we have made.

d365Legal opens to the whole firm on [date]. Before then, please: complete your Outlook contact clean-up by [date]; book your 45-minute training session via the intranet link; and note your team's super-user, who is your first port of call.

From go-live, marketing and event lists will be produced only from d365Legal, and legacy contact spreadsheets will be retired on [date]. Time and billing will be performed via the staff portal.

Support: drop-in clinics daily at 12:30 for the first month, floor walkers in each office for the first two weeks, and d365legal@firm.com throughout.

[Sponsoring Partner]

Countdown to go-live

T-3 weeks

All-staff email and partner briefing

T-2 weeks

Training sessions begin; clinics open

T-1 week

Contact clean-up closes; final data load

Go-live

Floor walkers; super-users on call

T+2 weeks

First adoption scorecard published

T+6 weeks

Legacy spreadsheets decommissioned

Business outcomes to be achieved

Why the firm is investing — expressed in partner language

More revenue from existing clients

A single relationship map surfaces cross-selling opportunities: target 8% growth in fees from top-100 clients through cross-practice referrals.

Better return on marketing and events

Accurate, consented, de-duplicated lists convert seminar and campaign spend into measurable pipeline instead of bounced email.

Faster, stronger pitches

Pitch history, credentials and prior relationships assembled in hours rather than days, improving panel and tender win rates.

Lower cost of data administration

Retiring private spreadsheets and manual list-building releases PA, BD and Finance time to client-facing work.

Defensible compliance

Consent, opt-out and data handling evidenced in one auditable system — reducing regulatory and reputational exposure.

Client knowledge retained by the firm

Relationships survive a partner's departure or retirement because they are recorded institutionally, not personally.

What success looks like — KPIs to be measured

Adoption first, data quality second, commercial return third

Measure	Baseline	6 months	12 months	Owner
Weekly active users (% of licensed staff)	0%	70%	85%	Change Lead
Fee earners logging client activity monthly	~15% (ad hoc)	60%	80%	Practice Heads
Contact records with complete core fields	41%	85%	95%	Data Steward
Duplicate contact rate	18%	5%	<2%	Data Steward
Marketing consent recorded and current	52%	95%	99%	Marketing
Pitches with full history in d365Legal	0	75%	95%	BD Director
Cross-practice referrals logged per quarter	Not measured	40	75	BD Director
Fee growth from top-100 clients	Baseline year	+3%	+8%	Finance
User satisfaction (quarterly pulse, 1–5)	n/a	3.6	4.2	Change Lead

Reported monthly to the Board as a one-page adoption scorecard; practice-group level results shared with each department head.

Communication risks and how we answer them

Anticipate the objection before it becomes the narrative

“This is surveillance of fee earners.”	Say it first, in writing, from the Managing Partner: d365Legal records relationships and activity, not billable performance or email content. Publish exactly what is visible to whom.
“I already have my contacts in Outlook.”	Demonstrate the sync. Show that participation is fewer keystrokes than today, and retire the alternative — lists come only from d365Legal after go-live.
“My client relationships are mine.”	Partner-to-partner conversation, not an email. Frame institutional records as protecting the relationship and the firm's value, and give visible credit for introductions.
“Another system that will be abandoned.”	Publish the 'you said, we changed' log, name the executive owner, and report the adoption scorecard monthly, including where it is behind.

Next steps

Agreeing these five actions this month keeps the communications plan ahead of the technology.

01

Approve the plan

Sign off phasing, messages and the named owner for each audience.

02

Confirm the pilot group

Nominate 10 users across Corporate, Marketing, BD, Finance and Administration.

03

Appoint super-users

Two per team, trained in the pilot, funded with protected time.

04

Launch data clean-up

Issue the Outlook contact preparation email and open the daily clinics.

05

Baseline the KPIs

Measure data quality and activity today so the scorecard has a starting point.

Questions and contributions: d365legal@firm.com