PILOT PROPOSAL

Microsoft Dynamics 365 CRM for Legal

d365Legal

A phased pilot — starting with the Disputes and Corporate Commercial teams, leading to firm-wide rollout.

Marketing & Business Development · July 2026



THE BUSINESS CASE · NOW

Value from day one

A single, trusted CRM immediately changes how the firm works.



Centralised, reliable information

One trusted source for clients, contacts and referrers.



Better communications

Coordinated emails, invitations, events and seasonal contact.



Improved efficiency

Staff do more with the time they have.



Higher client satisfaction

Consistent, well-informed client experiences.



New business generation

Spot, pursue and win more work, then manage it well.



Insight and reporting

Analyse trends to make informed business decisions.

THE BUSINESS CASE · LATER

Building the foundation for later

- **One version of the truth** A shared, reliable record with no duplicated effort or “sweat equity.”
- **Better information sharing** A clearer view of what’s going on changes how the firm engages.
- **Stronger cross-team collaboration** Disputes, Corporate Commercial and, in time, every practice group, every office.
- **Richer relationships** Capture, understand, leverage and strengthen client, referrer and influencer connections.
- **A single view of the practice** CRM connected to practice management and document management.



OUR APPROACH

Start small, prove value, scale



Start small

Focus on a lighthouse group for quick, early wins.



Demonstrable ROI

Meet and exceed key requirements before expanding.



Success stories

Turn early adopters into internal champions.



Phased rollout

Expand firm-wide once the model is proven.

Easier approval for the resources needed · implement and train while time permits · special fixed-cost implementation

WHERE WE START

Why these two teams first

Disputes

High volumes of contacts, referrers and opponents — clear value from centralised relationship tracking.

Corporate Commercial

Deal-driven work with pitches, panels and repeat clients — a strong fit for pipeline and deal-flow management.



Ideal “lighthouse” teams

- Engaged, “friendly” fee-earners and secretaries willing to act as data stewards
- Rich, structured relationships that showcase CRM value quickly
- Early wins that translate directly into firm-wide success stories

THE PLAN

A three-phase roadmap

1

Phase 1

Foundation

Marketing / BD data migrated, cleansed and synced with practice-management client numbers.

2

Phase 2

Lighthouse pilot

Disputes and Corporate Commercial go live, with data stewards and demonstrable ROI.

3

Phase 3

Firm-wide rollout

Additional practice groups onboarded and advanced features enabled.

Each phase is gated by the previous one’s demonstrable success — we scale only once value is proven.

PHASE 1

Foundation & clean data

1

Get Marketing / BD onto a single, trusted platform.

OBJECTIVE

Replace Excel, Word and Outlook contacts in Marketing/BD; cleanse and de-duplicate data; map practice-management client numbers for later sync.

FEATURES

Centralised organisation and contact segmentation, marketing lists, events, and deal-flow / pitch management.

AUDIENCE

The Marketing / Business Development team + lighthouse users (approx. 10–20 users).

TIMELINE

Two to three weeks to first value, working from existing data sources.

PHASE 2

Lighthouse pilot

2

Bring Disputes and Corporate Commercial live.

OBJECTIVE

Deploy to the two lighthouse teams and appoint “super-secretary” data stewards.

FEATURES

Marketing lists, events and activities; the Outlook client; surfacing fee-earner relationships.

AUDIENCE

Friendly fee-earners and secretaries, supported by communication and training plans.

TIMELINE

Begins 3–4 weeks after BD, building on proven ROI; pace set by training capacity.

Watch-outs connect and maintain Outlook contacts, and position Dynamics 365 as far more than a marketing tool.

PHASE 3

Firm-wide rollout & enhancement

3

Extend the platform across every practice group and office.

OBJECTIVE

Roll out firm-wide and add advanced capability, sequenced by practice group.

FEATURES

SharePoint document management, matter management, proposal generation, client teams, surveys and mobile access.

AUDIENCE

All remaining practice groups, onboarded in a planned sequence.

TIMELINE

Scheduled once the pilot's success is established and demand is confirmed.

Watch-outs some groups may be reluctant to share data — manage change and demonstrate mutual benefit.

AT A GLANCE

An indicative timeline

Four steps from a Marketing / BD foundation to firm-wide rollout.



Weeks 1–2

Phase 1 foundation

Marketing / BD live on d365Legal

Weeks 3–4

Prove value

Build ROI and early success stories

Weeks 5–6

Phase 2 pilot

Disputes & Corporate Commercial live

Beyond

Phase 3 rollout

Firm-wide expansion and enhancements

Timings are indicative and gated by the firm's capacity to train users.

ACCOUNTABILITY

How we'll measure success

1–2 wks	10–20	2	1
to first value in Marketing / BD	users onboarded in Phase 1	lighthouse teams live in Phase 2	single, trusted version of the truth

Beyond the numbers, we'll track:

- **Adoption & data quality —** Active use and clean, de-duplicated records.
- **Client & referrer engagement —** Coordinated, informed outreach.
- **Pipeline visibility —** Deals, pitches and panels tracked in one place.
- **Success stories —** Evidence to carry the firm-wide case.

IN SUMMARY

A pilot that proves itself

- A Marketing / BD-led pilot that starts small and delivers quick, early wins
- Easier resource approval and a special fixed-cost implementation
- Demonstrable ROI and success stories from Disputes & Corporate Commercial
- A clear path to firm-wide rollout and the full benefits of d365Legal

NEXT STEPS Confirm scope and data stewards · agree timeline and success measures · begin Phase 1.

“Start the CRM ball rolling — it will prove itself.”

