

MICROSOFT FRONTIER FIRM · D365LEGAL CRM

The Frontier Law Firm

Success starts with the client

How Microsoft's Frontier Firm shift is redefining client relationships in law — and how d365Legal turns every stage of the client journey into a connected, personalised experience.



What Microsoft means by the “Frontier Firm”

In its 2025 Work Trend Index, Microsoft describes the Frontier Firm: an organisation built around on-demand intelligence and human-agent teams. Three shifts define it.

1

Intelligence on tap

Reasoning AI becomes a resource every team can draw on, rewiring how knowledge work gets done.

2

Human-agent teams

AI agents work alongside people, reshaping the org chart and how work is scoped and delivered.

3

Every employee an agent boss

Professionals direct and orchestrate agents — raising the bar on judgement and client value.



71%

of Frontier Firm workers say their company is thriving — vs 37% globally.

Client experience becomes the strategic operating model

For decades, firms competed on technical excellence, reputation and matter outcomes. Those still matter — but frontier law firms now differentiate on the quality, consistency and personalisation of the client experience.

- Clients judge the whole journey — not just the advice at the end of a matter.
- They expect firms to remember context, anticipate needs and communicate transparently.
- This needs more than a contact database or matter system — it needs a connected engagement platform.

d365Legal connects relationship intelligence, business development, onboarding and matter inception into one coherent workflow.



One platform, from first enquiry to living matter

d365Legal, built on Microsoft Dynamics 365, carries context through every stage — so clients never have to repeat themselves.



1

Enquiry

Capture full context from the first signal.



2

Onboarding

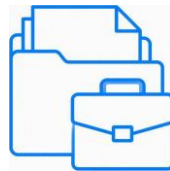
A guided, personalised front door.



3

Opportunity

Pipeline as relationship intelligence.



4

Matter inception

Seamless handoff, context carried forward.



5

Relationship IQ

Dashboards and ongoing intelligence.

A single Microsoft-native flow — relationship intelligence carried end to end.



STAGE 01 · POTENTIAL NEW CLIENT

From first enquiry to trusted relationship

Client-centric engagement begins before a matter exists. Referrals, enquiries, events and introductions are too often captured inconsistently — buried in inboxes or left to individual memory. d365Legal captures the full context from the outset, so the firm responds with relevance, not generic intake.

The result: a richer, more reliable first impression.

CAPTURED FROM DAY ONE

Client & stakeholders

Referral source

Practice area

Matter type

Commercial drivers

Urgency & risk

Relationship owner

Notes & activities

Follow-up actions



STAGE 02

Personalised onboarding is the new front door

Onboarding is no longer a back-office compliance step — it is the first real service experience the client receives.

Guided onboarding

Structured around each client and matter profile — tailored to the firm's own practice areas, terminology, risk model and service standards.

1

Guide Configurable business process flows capture required information.

2

Check Support conflict checks and record due diligence outcomes.

3

Coordinate Route approvals and generate engagement documentation.

4

Assure Maintain a clear audit trail from the first interaction.

Home

Recent

Pinned

My Work

Activities

BD Dashboard

Referrals Dashboard

Clients

Organisations

Individuals

Conflict Checks

Conflict Requests

Related Parties

Conflict Matches

Bus Development

Potential New Clients

Referrals

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Time Tracking

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Document Library

Marketing

Quick Campaigns

Event Responses

CRM

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Save & Close

Conflict Check

New

Refresh

Check Access

Qualify

Process

Disqualify

Assign

Share

Summary

ABC Inc. seeks legal advice on supplier contract dispute causing delays and losses; lead topic Franchise Purchase Legal Advice created on 5/18/2026; primary contact Adam Bryant; open opportunities exist.

• ABC Inc. is a UK-based manufacturing and supply business seeking legal advice for a supplier contract dispute involving delayed delivery of specialist manufacturing components.

• The delay has caused project disruption, additional costs, and potential commercial loss.

• The organisation is undergoing assessment for conflict, KYC, and engagement approval before formal legal work begins.

• The lead topic is Franchise Purchase Legal Advice created on 5/18/2026 4:27 AM.

• The primary contact associated with the parent account is Adam Bryant.

• There are open opportunities related to the parent account under the topic Advisory required for corporate lending compliance and structuring.

See full summary

Copy

Copilot Summary

Last Refresh: Just now

John Smith - Saved

Lead

Why Did You Choose Us

Warm

Rating

New

Status

DB

David Blumentals

Entered By

Lead to Opportunity Sal...

Active for 50 days

Draft (50 D)

Submitted

Negotiation

Won

Closure

Summary

Administration

Preference

Active for 50 days

Form assist

CONTACT

Brief Description

Franchise Purch

First Name of Client

John

Middle Name of Client

Last Name of Client

Smith

Caller Name

Practice Area

Technology

Law Type

Matter Type

Job Title

Existing Contact?

Existing Account?

Purchase Timeframe

Estimated Budget

Purchase Process

Identify Decision Maker

Capture Summary

✓

ABC Inc.

x

mark complete

Need Advice

Franchise Purchase

Next Stage

ne

Search timeline

Enter a note...

Highlights

recent

Auto-post on Lead John Smith: 5/18/2026, 4:27 AM

Legal created John Smith

All Stakeholders

✓

Name

↑

↓

Role

No data available.

All Competitors (summary)

Select all

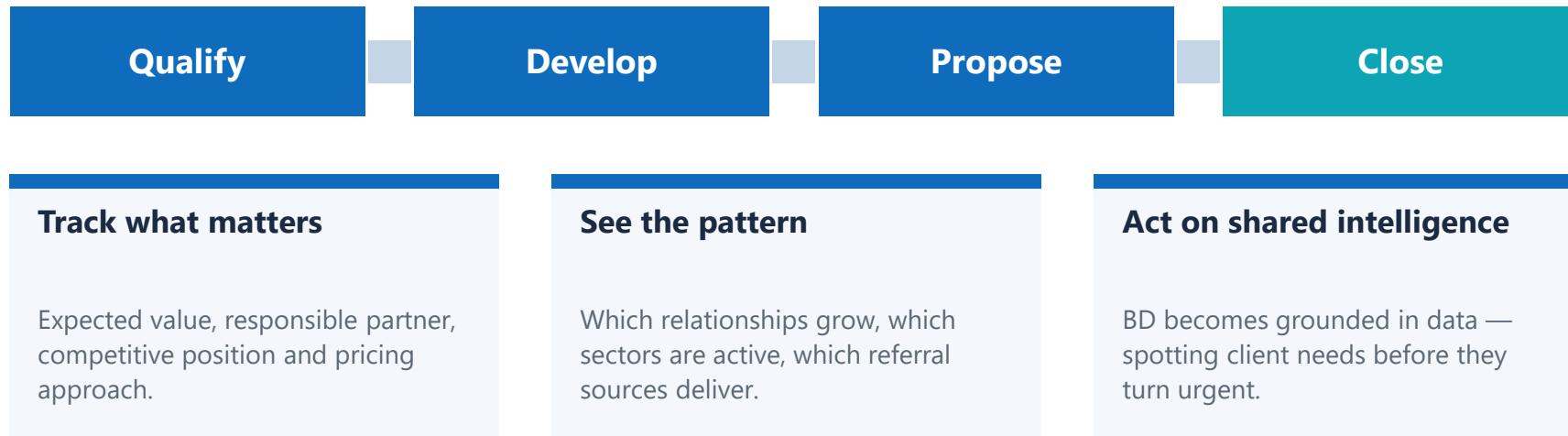
↑↓



STAGE 03 · BUSINESS DEVELOPMENT

Opportunity deal flow becomes relationship intelligence

Opportunity management isn't just pipeline reporting — it is the disciplined management of trust, timing, expertise and value. Firms manage pitches through configurable stages, with pipeline views and Kanban-style deal flow that show what's moving, what's stalled and where to intervene.



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Time Tracking

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Quick Campaigns

Event Responses

C

CRM

Generate Experience S...

Save

New

Close as won

Close as lost

Recalculate

Conflict Check

Word Templates

AI-generated content may be incorrect

Share

Summary

ABC Inc. seeks legal advice on a supplier contract dispute causing project disruption; the Originating Lead is Daniel Reed with Primary Contact Adam Bryant and Account...

Last Refresh: Just now

See full summary

Advisory required for corporate lending compliance and structuring. - Unsaved

Submitted Pitch Stage

DB David Blumentals Pitch Owner

Lead to Opportunity Sal...
Active for 70 days

Draft

Submitted (67 D)

Negotiation

Won

Closure

Summary

Line Items

Quotes

Administration

Related Parties

Lawyers

Related

Form assist

Guided Business Process Flow

Status Reason

In Progress

Client / Account

ABC Inc.

Primary Contact

Daniel Reed

Responsible Lawyer

Originating Lead

Daniel Reed

Description

More Details

Risk Rating

Low

Medium

High

Conflict Check Status

Pending

Cleared

Failed

Practice Area

Banking & Finance

Law type

Matter Type

Advisory require...

Auto-post on Opportunity Advisory required for... 5/1/2026, 5:03 AM

Opportunity created by Antony Clarke for Individual Daniel Reed

Dates and Times

Estimated Hours

160

Est. revenue

\$60,000.00

Submission Date

7/8/2026

Costs Estimate Date

M/d/yyyy

Cost Estimate Option

Expected Decision Date

7/31/2026

Track What Matters

Financials

Currency *

Australian Dollar

Fee Structure

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Bus Development

Potential New Clients

Referrals

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CRM

Sales Pipeline Dashboard

Last loaded: Jul 8, 2026, 3:12 PM

Refresh

OverviewLeadsPitchesMatters

OWNER

CLIENT / COMPANY

LEAD STATUS

PITCH STATUS

PITCH STAGE

FROM

TO

QUICK PERIOD

Apply

Clear

PIPELINE CONVERSION

LEADS

3

\$90,205.00 budget

PITCHES

2

\$85,000.00 est.

67% from leads

WON PITCHES

0

\$0.00 actual

0% win rate

MATTERS

41

3 from pitch

0% pitch → matter

PIPELINE VALUE

LEAD BUDGET TOTAL

\$90,205.00

estimated value

OPEN PITCH VALUE

\$85,000.00

estimated value

WON PITCH VALUE

\$0.00

actual close value

LOST PITCH VALUE

\$0.00

estimated value

TOTAL PIPELINE

\$175,205.00

leads + open pitches

Leads created over time

Monthly new leads vs pitches created

LeadsPitches

Leads

Pitches

2.0

1.8

1.6

1.4

1.2

1.0

0.8

0.6

0.4

0.2

0

Aug 25

Sept 25

Oct 25

Nov 25

Dec 25

Jan 26

Feb 26

Mar 26

Apr 26

May 26

Jun 26

Jul 26

Pitch pipeline by stage

Estimated value per stage

Submitted

Draft

\$0

\$10,000

\$20,000

\$30,000

\$40,000

\$50,000

\$60,000

See the Pattern



STAGE 04 · NEW MATTER INCEPTION

New matter inception should feel seamless

The handoff from opportunity to matter is one of the most important — and most vulnerable — moments in the client journey. Too often, information captured during pursuit is re-entered, lost or disconnected from the delivery team.

When a pitch is won, d365Legal creates the live matter record — carrying context forward so clients never repeat themselves.

The matter team starts with a clear view of what was promised, who is involved, and what terms were proposed.

CARRIED FORWARD

- Client & contacts
- Scope & matter type
- Practice area
- Pricing & commercial terms
- Key stakeholders
- Documents & activity history
- Identified risks

What frontier firms will do differently

01

Start with the client, not the matter

Relationship context and service preferences shape how work is scoped and delivered.

02

Personalise the experience

Onboarding, communications, approvals and reporting reflect each client's sector and risk profile.

03

Connect BD with delivery

Opportunity intelligence flows into matter inception — reducing rework and improving continuity.

04

Use data to improve service

Dashboards reveal pipeline health, conversion trends, client activity and service opportunities.

05

Embed compliance in the workflow

Conflict checks, access controls, audit trails and approvals support obligations without friction.

A Microsoft-native pathway to the frontier

The firms that win the next decade will combine legal excellence with client-experience excellence — knowing clients better, responding faster and delivering through modern, transparent, tailored operating models.

d365Legal moves firms beyond generic CRM and fragmented intake tools — onto one Microsoft-native legal engagement platform covering the complete journey:

● **Client onboarding**

● **Opportunity deal flow**

● **Pitch management**

● **Quote creation**

● **Conflict support**

● **Matter inception**

● **Collaboration**

● **Activity tracking**

● **Dashboards & analytics**

● **Relationship intelligence**

● **Audit & governance**

● **One connected system**

THE MESSAGE FOR LAW FIRM LEADERS

Re-inventing client engagement is no longer optional

Frontier law firm success starts with clients. The firms that design every stage of the journey around them will set the new benchmark for legal service delivery.

See d365Legal in action

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#Microsoft #Dynamics365 #Legal #d365Legal #CRM #OneSystem

