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LEGAL OPERATIONS: MATTER & LEGAL SPEND MANAGEMENT

BUYER'S GUIDE

Legal Operations: Matter & Legal Spend Management Buyer's Guide
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Solution by Organization Size		
Small Organization: 1-100 Employees	Midsize Organization: 101-1,000 Employees	Large Organization 1,000+ Employees
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About

The Legal Operations: Matter & Legal Spend Management Buyer's Guide is a publication of the Legal Tech Publishing division of the Legal Tech Media Group (LTMG) **legaltechmg.com**.

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Welcome to Legal Tech Publishing's Legal Operations: Matter & Legal Spend Management Buyer's Guide

By: Cathy Kenton and Brian Dalton

Cathy Kenton, CEO,
Legal Tech Media Group/Legal Tech Publishing

As the second of two guides dedicated to Legal Operations, we trust that you will find this companion guide to our earlier publication helpful to your legal department.

Today's legal departments are embracing technology to help them take greater control of their internal operations and the outside counsel they manage. Matter management and controlling legal spend are at the top of the needs list. From managing outside counsel to reporting to the C-Suite, legal operations professionals and corporate counsel in every size organization need the proper solutions to work efficiently.

The 2022 edition of the Legal Operations: Matter & Legal Spend Management Buyer's Guide and Above the Law's dedicated Non-Event page are your go-to resources to identify and learn more about legal department automation.

To your success,

Cathy Kenton,
CEO, Legal Tech Media Group/
Legal Tech Publishing and

Brian Dalton,
SVP, Breaking Media

Brian Dalton, SVP, Breaking Media

BigHand Brings Matter Pricing and Profitability to Law Firms and Increases Value to Clients

> **"BigHand Matter Pricing provides current and historical matter and timekeeper performance data to help law firms make informed decisions about resourcing, budgeting, and pricing."**

Company Name Brand
BigHand

Product Name Brand(s)
BigHand Matter Pricing

Latest Developments

- BigHand acquired Iridium Technology to enhance reporting and data analytics.

Effective Budgeting and Planning
Clients expect budget and cost transparency on matters. Still, law firms often struggle to develop effective pricing strategies and sufficient reporting and analytics around matter budgeting to give clients an understanding of their status.

BigHand Matter Pricing provides current and historical matter and timekeeper performance data to help law firms make informed decisions about resourcing, budgeting, and pricing. Firms can track matter performance in real time or as fast as lawyers report time and send budget reports to clients, ranging from summaries to detailed fees and disbursements.

The BigHand Pricing and Profitability main landing page conveys the impact a budget has on a matter and the firm's profitability. The main landing page displays role-based information including KPIs such as the number of matters with and without budgets, the number of live matters, the number of realizations with and without budgets, and average profitability per hour. Users can drill down into the performance of matters with budgets and timekeeper titles, with access to matter budgets a user worked on, is associated with, and created. With data pulled from a practice management system, set up a budget and assign it to a matter or link it to a client after it's approved. Send approvers a link to the budget via email or export the budget as a PDF or Microsoft Excel spreadsheet to send as an attachment.

Creating a New Budget
BigHand's Matter Pricing user interface (UI) hides complexity in plain view, allowing pricing teams and attorneys an easy, self-service method to drive profitability for the firm and deliver valuable information to clients. *See Figure 1*.

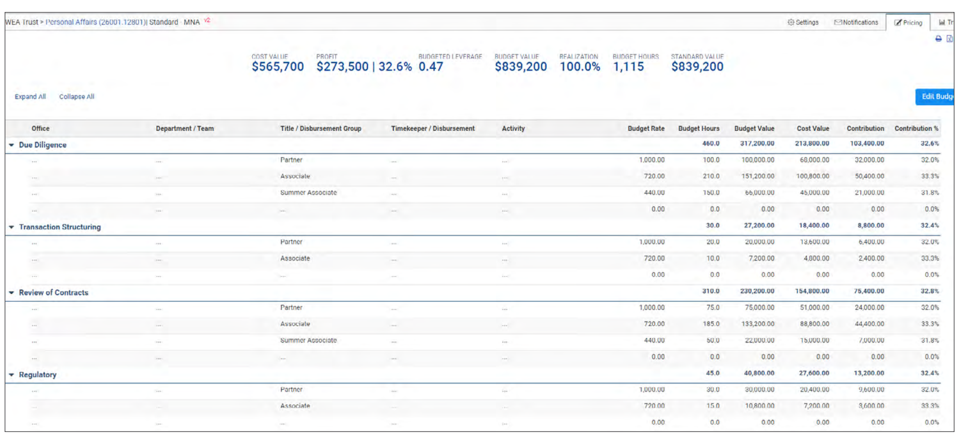

Figure 1: BigHand Pricing and Profitability lays out a matter budget in an accessible, self-service format that pricing specialists and attorneys can use without in-depth training. It includes figures for cost value, profit, budgeted leverage, realization, budget hours, and standard value.

> "BigHand can ingest data from previous matters and create or clone a budget from metadata, financial data, and time records. Ingest matter records from a practice management system, and BigHand presents a list from which to choose the matters to clone a budget."

BigHand Matter Pricing is built to make creating budgets simple. When building a new budget, pricing teams are only required to know the pricing type and the template. When selecting a client and matter, associated rate schedules and currency (CAD, EUR, GBP, USD) come with it. Then select the beginning and end dates for a project and decide whether to create a budget from the top down or bottom up.

For the bottom-up approach, firms have access to default templates and can create their own templates with information pulled from the practice management system. From the bottom up, start assigning lawyers and other timekeepers tasks or phases of work to complete within timeframes or phases. Allocate work by the number of hours a lawyer needs to spend on the matter, or the percentage of work projected for the case. Set the time required of each individual, and the system calculates vital information such as cost value, profit, budget value, realization, budget hours, and standard value based on their rates.

Focusing efforts on tracking a number in the budget can help avoid cost overruns and write-offs. You can also determine whether to engage a case that turns a profit or if an adjustment is required to meet profitability goals.

To make a proposed adjustment to the matter, click on the "What-If Analysis" in the upper right-hand corner of the UI. Sliders appear to adjust hours or rates, recalculating the top budget values, including the cost value and profit. Apply the changes in one click or disregard the changes to return to the original budget.

To create a budget from the top down, pricing teams have the option to set a budget by total amount or define by phase and set a budget by hours or value. After setting an expected budget value, fill the budget with lawyers and their associated rates and time allocations to complete the matter. Add people to do the work by the percentage of effort required, dollar amount, or by the hours they can spend on the case.

Cloning

Firms have a wealth of data in their system. BigHand can ingest data from previous matters and create or clone a budget from metadata, financial data, and time records. Ingest matter records from a practice management system, and BigHand presents a list from which to choose the matters to clone a budget. *See Figure 2*.

With 50 filtering options, cull cases to find those similar to the matter in hand to establish a budget. For example, take the cases in a select jurisdiction by type, and limit them to matters with more than 80 percent realization. Once you narrow down the list to a few representative matters, select them for inclusion.

Select up to ten matters to clone a model budget. BigHand takes the average of time and expense records and fills a pricing screen to customize. With cloning, you can calculate a budget for a prototypical matter or transaction and reuse it like a document template.

Tracking

BigHand's Tracker screen compares a matter budget in fees, costs, and counsel

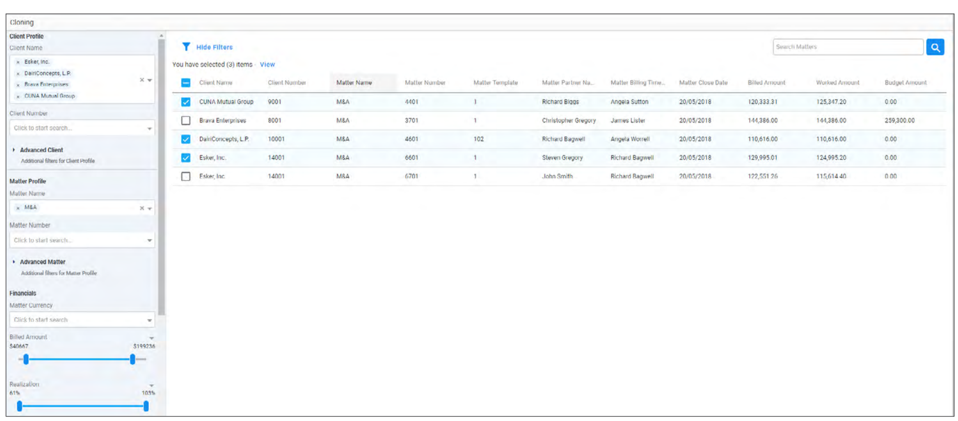

Figure 2: BigHand Pricing and Productivity can clone a budget from time records and financial data of previous matters.

> **"Timekeeper fee data trickles into bar charts to compare budgeted amounts with totals over time or matter phases. Compare hours worked with budgeted hours, percent realization, and dollar amounts for actual and billed work."**

fees with actual data in total and subtotals in phases or segments of work. *See Figure 3*.

Timekeeper fee data trickles into bar charts to compare budgeted amounts with totals over time or matter phases. Compare hours worked with budgeted hours, percent realization, and dollar amounts for actual and billed work. Generate an activity report on demand and export it in PDF or Microsoft Excel format.

Notifications

There is an associated notifications page for every budget with a pricing and tracking page. Configure the software to send one or more notifications to select users when the overall budget closes in on a maximum amount. You can also alert users at budget milestones in segments or phases, such as expending a threshold of hours on a task or if a task threatens to overrun a budget. Alerts allow stakeholders to analyze the risk and consult with the client to avoid sending bills that exceed a budget or result in discounting invoices, thus reducing realization.

Integrations and Deployment

Matter Pricing integrates with any practice management system to ingest financial and time records. A typical deployment is under eight weeks, whether installing the software on-premises or using it in the cloud. Most firms spend the initial time on user acceptance, testing, integration with practice management, and customizing budget calculations, such as using indirect or direct costs and defining leverage. BigHand has industry experts to help firms achieve their financial objectives.

Pricing

BigHand bundles Matter Pricing into annual subscriptions calculated by the number of timekeepers in the firm. There is a nominal implementation fee for deploying matter pricing on-premises or in the cloud.

Who is BigHand?

Founded in 1995, London-based BigHand offers productivity software to manage the legal business, documents, people, workflows, and finances—including software for digital dictation and speech recognition, business intelligence (formerly Iridium BI), budgeting, and matter pricing. The company extended its analytics offerings by acquiring Iridium Technology in 2022. With offices in the UK, US, and the Asia Pacific region, BigHand has over 350 employees supporting more than 3,600 global clients, comprising 82 percent of UK top 200 firms and 81 percent of AmLaw 200 firms.

Why Buy BigHand Matter Pricing?

- Manage and track budget against actual spending.
- Create budgets from the top down or bottom up.
- Clone previous matters to create more accurate budgets.
- Apply what-if scenarios to compare budget options.

Schedule a Demo Today!

See BigHand Matter Pricing in action to learn how the pricing software can help you create and track matter budgets and price matters for profitability.

Figure 3: The BigHand Matter Pricing Tracker screen compares a matter budget with actual costs, expenses, and attorney fees.

brightflag

Brightflag's Outside Counsel Management Platform Enables You to Strategically Streamline Outside Counsel Spend and Matter Management

> "Dashboards are dynamic, with clickable links so you can drill down to supporting information for further analysis. Brightflag provides user and role-based security, presenting only the information a user is permitted to see."

Company Name
Brightflag

Product Name Brand
Brightflag

Latest Developments and Updates

- The Brightflag Workspace module allows users to manage tasks, calendaring, collaboration, and document management in a secure environment fully integrated with Brightflag's core tool.
- Reporting upgrades include simplified report setup with faster load times, advanced search, sort, and filter controls, and additional templates users can save to build their own reports.
- Brightflag's Legal Service Requests module offers corporate legal departments a powerful way to centralize intake, triage requests, and understand demand for legal services across the business.

Information Access and Dashboards
Brightflag's cloud-based platform includes tools and features corporate legal departments need to gain visibility into operations, maximize productivity, and engage with outside counsel strategically. Streamline matter management and incoming requests for legal services and automate invoice review and payment. You can harness Brightflag to minimize time spent on administrative work and, in turn, spend more time on strategic work.

A vital aspect of any outside counsel management tool is quickly getting information from the system, and Brightflag offers several dashboards that do just that. For example, the Spend Breakdown dashboard shows a legal department's total spend on outside counsel, with breakdowns by law firms, matter category, and department. By providing this overview, general counsel and a company's C-suite can easily see where dollars are spent, and the type of matters managed in relation to the budget. *See Figure 1*.

Dashboards are dynamic, with clickable links so you can drill down to supporting

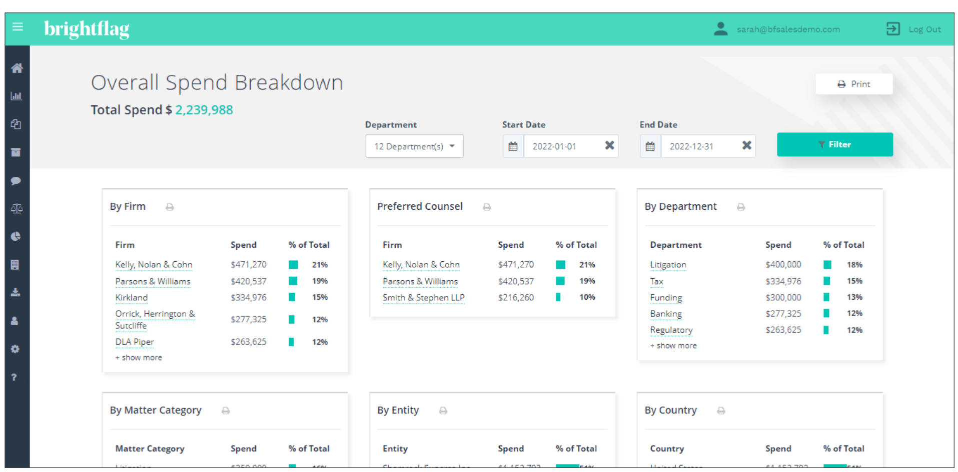

Figure 1: The Spend Breakdown dashboard gives a high-level view of legal department or firm activity. A general counsel or head of legal operations can see what is happening by firm, preferred counsel, department, matter category, entity, country, and more. All these data points are highly customizable.

“Legal departments can efficiently triage requests, accept and convert to a matter, or quickly respond to an issue with minimal legal involvement. Additionally, this standardization of incoming requests and questions for the legal team provides metrics and shows the department’s value.”

“Artificial intelligence, combined with Brightflag’s reporting, provides in-house legal teams deeper, clearer visibility into their spend. Brightflag utilizes AI and machine learning to read and understand each line item submitted and automatically classify tasks and activities, so a law firm won't need to alter its time-keeping protocols by adding specific task codes or classifications.”

information for further analysis. Brightflag provides user and role-based security, presenting only the information a user is permitted to see.

Requests and Matter Management
Matter management is a challenge for in-house and outside counsel. There are a number of options designed for law firms, but Brightflag is a purpose-built tool that focuses on the specific needs facing an in-house legal team, and they start at the beginning–requests for legal services.

Companies need legal services from their in-house department for a variety of reasons, and it can be challenging to get all of the information into a single system of record. Brightflag streamlines the entire process, giving you an easy way to submit a request via a branded web form or using the Request API, eliminating the need for phone calls or email. As a result, legal departments can efficiently triage requests, accept and convert to a matter, or quickly respond to an issue with minimal legal involvement. Additionally, this standardization of incoming requests and questions for the legal team provides metrics and shows the department’s value.

Once a matter is in the system, users with access to a matter are able to see a high-level dashboard, including tabs for the matter summary, details, notes, reports, invoices, financial data, vendors, and budgets. Brightflag provides a central repository for the legal team to store and access data specific to a matter. Legal teams can also use Brightflag Workspace to manage tasks, calendaring, and documents for the matter. Tight integration with email, legal hold software, and more extend the platform’s capabilities.

Invoices, Billing, and Budgeting
One of the most tedious tasks for any legal department is dealing with the financial aspect of providing legal services–Brightflag can help with that.

Brightflag doesn’t charge a client’s vendors to access and submit invoices. They manage all onboarding and training for vendors and outside counsel, so clients are not faced with technical support. Vendors can submit invoices via LEDES (Legal Electronic Data Exchange Standard) format or PDF. Brightflag’s Artificial Intelligence (AI) automatically extracts PDF invoices so in-house users have the same experience reviewing LEDES and PDF invoices.

Artificial intelligence, combined with Brightflag’s reporting, provides in-house legal teams deeper, clearer visibility into their spend. Brightflag utilizes AI and machine learning to read and understand each line item submitted and automatically classify tasks and activities, so a law firm won’t need to alter its time-keeping protocols by adding specific task codes or classifications. You can configure and apply billing guidelines for each invoice, and Brightflag offers sample legal billing guidelines to help get started. If a rule infringement occurs, it is flagged for review. This can save time, simplify the invoice review process, and manage spending against a matter budget. Using the Flags feature, you can turn on the toggle switch next to a flagged rule violation to enforce the rule and adjust the bill. *See Figure 2*.

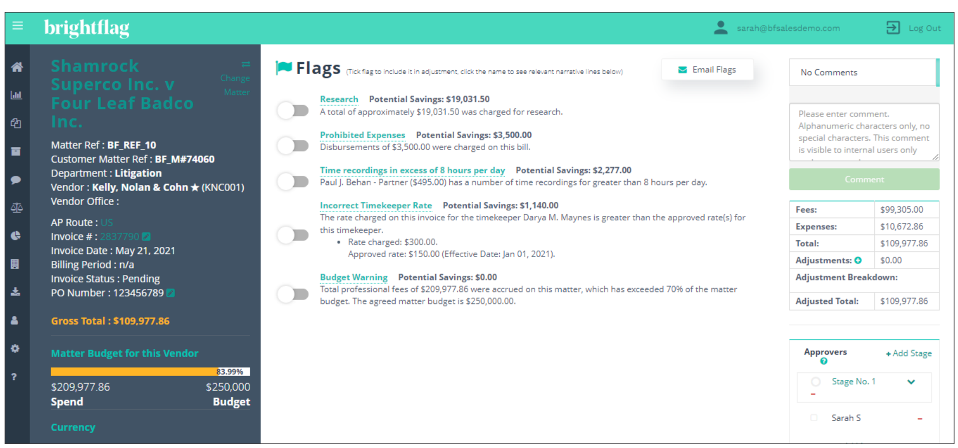

Figure 2: Invoice review provides the opportunity to remove billing violations with a single click of a Flag toggle switch, or with a few more, you can look line by line for a more granular approach. The invoice review page shows information about the invoice and how it impacts the current budget, as well as other billing details.

You can also look at all individual line items on a bill that are flagged for the rule's violation. Clicking on the rule name filters all line items returning only the ones in violation, so you can determine which line items can remain and which ones will be removed or adjusted. These features improve effectiveness and reduce time reviewing invoices. Once the invoice is approved, it is routed to the finance system for payment.

Brightflag has mitigated traditional challenges by providing multiple ways to create and manage a budget. You can create a budget at the matter level (monthly, quarterly, annual, phase), outlining budgets agreed upon individually with vendors and providing insight into spend vs. budget. Warnings can be generated when a vendor is within a certain threshold or in danger of exceeding the budget, triggering flags on an invoice.

A budget can also be established at a broader cost center level, such as overall, entity, department, vendor, practice area, or matter group. The platform automatically pulls in all relevant matters, and you can see the approved and pending spend, accruals, committed dollar amount, and the cost center budget on the Cost Center dashboard.

Once a budget is created, Brightflag's use of AI and machine learning delivers aid in predicting how much spend is likely to be incurred under each top-down budget, providing legal spend predictability–one of the most sought-after functionalities by a legal department. As a result, insights gained from these predictions assist in future budget development.

Reporting

A variety of out-of-the-box reports are included, such as Spend by Month, Spend vs. Budget, Blended Rate by Time, Accruals, Matter Comparison by Firm, Matter Comparison by Country, Phase Analysis by Firm, Phase Analysis by Country, and Savings Analysis by Firm. These reports can be filtered and modified by date range, practice area, vendor, and more. Reports can also be exported for use in other applications.

Brightflag provides in-house departments the opportunity to evaluate vendors based on several key areas, including communications, quality, business alignment, and budget management. For example, information collected across several matters is aggregated and provided in a bar chart, showing how each vendor is rated. This report can give insight into performance trends and help feed into a preferred vendor program. *See Figure 3*.

Integration

Brightflag has an open API and currently integrates with several applications. In the legal and productivity space, this includes Microsoft Outlook, document management, IP management, and legal hold. Brightflag integrates with COUPA, SAP, Workday, Oracle, and Bill.com in the financial space. Business intelligence integrations include PowerBI, Tableau, and Qlik. Integrations for identity management and single sign-on (SSO) include Okta, Google, Azure, Onelogin, and Ping Identity.

Pricing

An annual subscription price is based on spend under management. Clients are not charged for upgrades, maintenance, vendors, ongoing training, file storage, or custom reports. More detailed information is available through a consultative discussion.

Who is Brightflag?

The Brightflag Legal Operations Platform is where corporate legal departments gain visibility into operations, maximize productivity, and strategically engage with outside counsel. Brightflag leverages AI and machine learning and has invested more than 100,000 hours in the development of its patented solution. The company serves a global community of legal professionals from offices in California, New York, Ireland, and Australia.

Why Buy Brightflag?

- Review of outside counsel billing is streamlined and less burdensome.
- Harnessing AI, Brightflag provides deeper insight into outside counsel spend.
- The intuitive interface accelerates adoption for internal and external users.

Looking for a New Way to Manage Your Legal Spend?

Reach out to Brightflag and book a demo today.

You can learn more by listening to the In-House Outliers Podcast or the Legal Ops 101: On-Demand Learning Series. You can also visit BrightFlag's Resource page for blogs, webinars, and more.

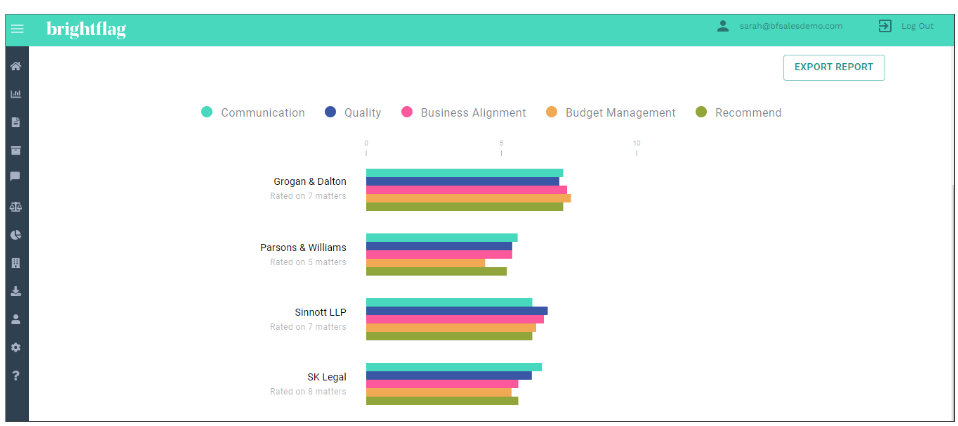

Figure 3: The Vendor Performance dashboard shows how firms are doing based on aggregated information collected from each matter.

MOXO

Improve your Firm's Processes with a OneStop Hub to Manage Client Interactions and Create Client-Centric Digital Workflows

> **"The OneStop portal allows users to work together when managing tasks, instant messaging, video messaging, making video calls, and sharing/ annotating documents. Users can set up virtual data rooms to share documents in a centralized data workspace, providing one place to keep records of all shared, categorized, and annotated files."**

Company Name Brand
Moxo

Product Name Brand(s)
Moxo Flow, OneStop™ Client Interaction Hub

Latest Developments and Updates
- Major rebranding of Moxtra – now Moxo.
- Launched Moxo Flow, updating the platform for law firms and legal professionals to streamline client-centric business workflows for the complete client management lifecycle, including account onboarding, account servicing, and exception handling.
- New integrations with HubSpot and Salesforce.
- Filevine integration launches soon.

Increase Operational Oversight
Many moving pieces are involved in managing client relationships and matters. Many law firms have separate systems for interacting and collaborating with clients and staff. The struggle to administer and oversee multiple elements in disparate systems can cause follow-up delays and service delivery errors, taking valuable time away from strategizing on a matter and consuming more time putting out fires due to miscommunication. The Moxo platform provides law firms with a way to seamlessly interact and engage with clients digitally to improve overall efficiency.

Client Portal and Business Portal
Firms can personalize their client and staff experience with a configured portal delivered under their brand. The portal is designed for clients, customers, or partners to interact with their legal teams and is available in both web and mobile applications. Additionally, legal and business teams can engage and collaborate within the portal. The OneStop portal allows users to work together when managing tasks, instant messaging, video messaging, making video calls, and sharing/annotating documents. Users can set up virtual data rooms to share documents in a centralized data workspace, providing one place to keep records of all shared, categorized, and annotated files. Interactions can be made in real-time with an internet or data connection, regardless of whether a user is running the mobile app or web version. *See Figure 1*.

Create a digital workspace to manage and streamline client interactions, meetings,

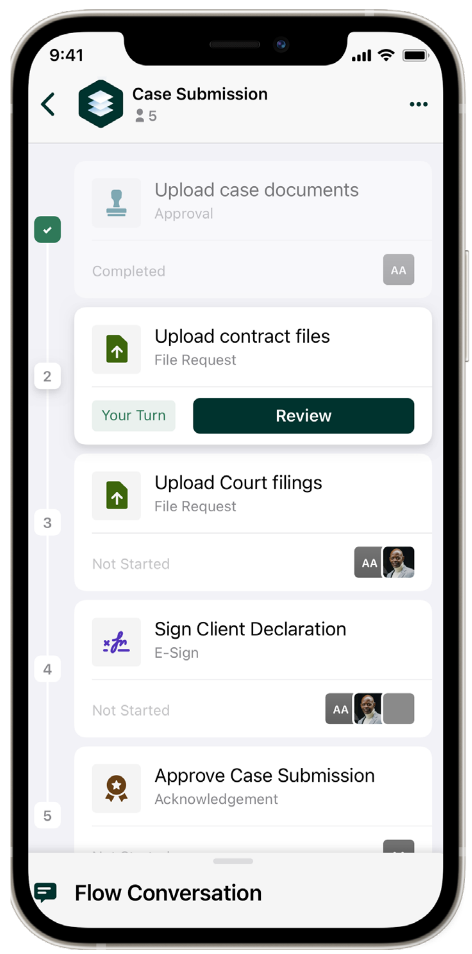

Figure 1: The OneStop mobile app displays the flow for case submission, showing the completed first step and a user's turn to review as the next step.

> Moxo has gone even further to help teams collaborate, providing client-centric workflows through Moxo Flow to bring all pieces together and further manage interactions through digital workflows."

> Moxo has an open API, allowing users to create integration with existing applications, including email, customer relationship management (CRM), document management systems, and e-signature applications."

and tasks. A team can use Moxo's video and conference calling functionality, where you can share documents via the screen-sharing feature. A user can markup documents using annotation tools such as draw, comment, highlight, and more. You can access a clean, annotation-free document in the content library while the marked-up document is stored in the workspace.

Workflows

Moxo has gone even further to help teams collaborate, providing **client-centric workflows** through Moxo Flow to bring all pieces together and further manage interactions through digital workflows. You can use Flow to automate processes and streamline document creation, driving time and cost efficiencies.

Create a flow in just a few steps. Identify the business process; identify each step or action within the workflow (such as approval, acknowledgment, file request, e-sign, or task); assign each action to a role on the team (such as a partner, associate, paralegal, or client); and identify any message to include that may give insight into the action and what is required.

Access Moxo Flow via the left navigation panel in the portal. Once Flow is open, a user sees existing workflows. Clicking a flow shows the actions required for that business process. For example, a client onboarding process shows the type of actions available to add in the left panel, while the main panel displays the steps added to the workflow. *See Figure 2*.

Drag and drop actions into the workflow, follow the prompt to assign the action to a team role, and add any message necessary to provide insight and requirements for the action.

When a flow is started, a user sees a notation in the communication timeline and an indication of workflow progress. For example, a user can see a case submission under the timeline when a case submission is started. The Flow is displayed in the center panels along with the status, such as in-progress or overdue. The system shows when a user has an action item with a "your turn" status message. In the far-right panel, a user can see all steps and actions taken along with any interactions. *See Figure 3 on the next page*.

Security

Moxo enables the seamless extension of business processes. The digital solution can be deployed as a private cloud, shared multi-tenant cloud, or on-premises for enhanced security. Administrators control access to cases through role or group-based permissions. Data is fully encrypted in compliance with the E-Sign act. Moxo is engineered to meet the stringent security requirements of regulated industries with best-in-class compliance, including SOC III, GDPR, and PSD2.

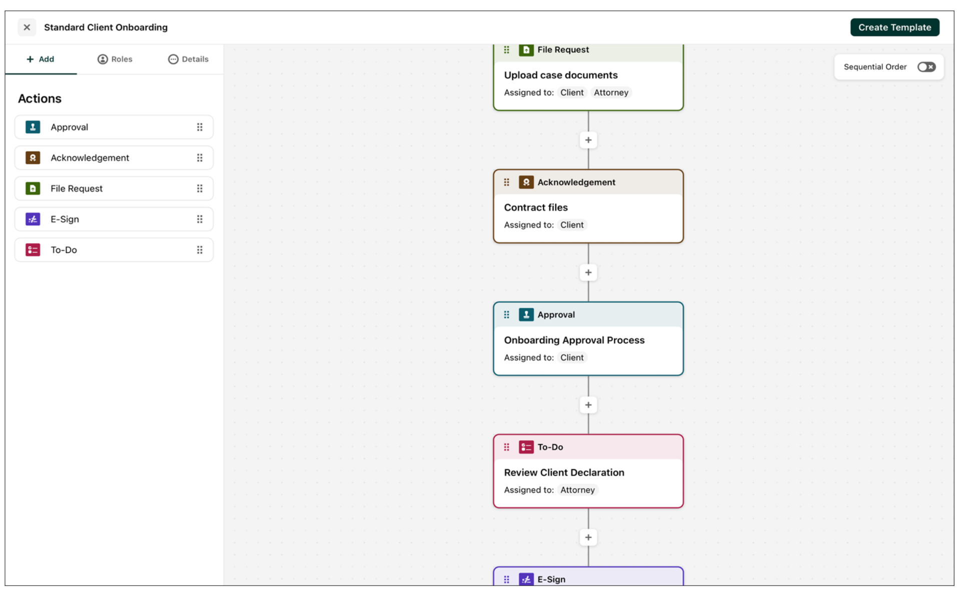

Figure 2: An example of a standard client onboarding template shows a list of all action types available to include in the workflow. The right panel shows the added actions. Each action can be assigned to a role (client, attorney), and when triggered in a workspace, the task is assigned to the team member in that role.

Integrations

Moxo has an open API, allowing users to create integration with existing applications, including email, customer relationship management (CRM), document management systems, and e-signature applications. Moxo integrates with HubSpot, Salesforce, Dropbox, Google Drive, Box, and OneDrive document repositories. Moxo evaluates and develops integrations as requested by clients. Moxo provides access to an API/SDK with the advanced package, allowing users to create their own integrations with applications specific to their needs. Contact Moxo to get a complete list of existing integrations.

Pricing

Moxo has monthly and annual pricing options. In addition to the pricing below, add-on and custom pricing are available. Contact Moxo for specific pricing questions.

Who is Moxo?

Moxo provides a OneStop Client Hub to manage client interaction workflows through modern digital automation and relieve the chaos of fragmented silos. Streamline deadline-driven client interactions, including account onboarding, account servicing, and exception handling. The Moxo team has a rich history of pioneering in the engagement space. Moxo co-founder and CEO, Subrah Iyar, was the co-founder and CEO of Webex, and Moxo co-founder and CTO, Stanley Huang, held senior engineering management positions at Cisco Systems and WebEx. Moxo headquarters are in Cupertino, California, with offices in London, New York, Amsterdam, Bengaluru, Shanghai, and Singapore. Moxo was named the winner of the 2021 LegalTech Breakthrough Awards. Learn more about Moxo through client success examples Marcela Halmagean Law and Adaptive Law Firm.

Why Buy Moxo?

- Moxo Flow enables an organization to automate routine tasks and configure custom workflows that align with business processes.
- Mobile and Web Apps are intuitive and provide complete access to a matter.
- Streamline client-centric processes through automated digital workflows with task dependency encouraging consistency and defensibility.
- The OneStop Client Interaction Hub provides a configurable, personal, and modern solution for servicing clients in the digital world.
- Establish better operational oversight over all interactions with end-to-end client management.

See Moxo Today!

Schedule a demo today or email Moxo at contact-us@moxtra.com. Follow Moxo on LinkedIn, Twitter, Facebook, and Instagram.

Starter	Business	Advanced
• Pay Monthly: $100/month (annual commitment) • Pay Annually: $1,080/year ($90/month)	• Pay Monthly: $480/month (annual commitment) • Pay Annually: $5,100/year ($425/month)	• Custom pricing
• 10 Active Users* – Additional User Packs Available • 3 Workflow Templates • Includes: – Client, Business, Admin Portals – Messaging, Video Meetings, File Sharing, Approvals, Acknowledgements, To-dos, File Requests, Digital Signatures – Workflow Builder and Templates	• 40 Active Users* – Additional user packs available • 10 Workflow Templates **Everything in Starter, plus:** • 3rd party integrations • Reporting • Audit • Live Chat • Service Requests • SAML SSO • *Private labeled app add-on available*	• Custom User Pack • Custom Workflows **Everything in Business, plus:** • API/SDK access • Option for private cloud • Option for on-premises

*A user is considered an active user in a given month if they complete at least one action within Moxo. Actions include sending messages, sharing files, scheduling/joining meetings, signing documents, filling out forms, or completing approvals/acknowledgments. Users include both internal and external users.

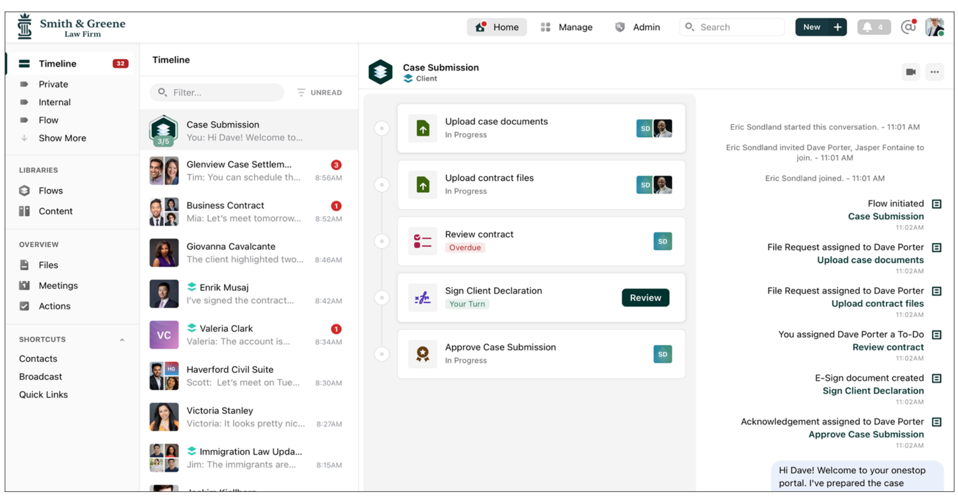

Figure 3: An example of a timeline with case submission flow selected displays all steps and their status. The far right presents a conversation panel that tracks the initiation of the flow and a place for a team to collaborate.

Onit's Enterprise Legal Management (ELM) Streamlines Workflows and Drives Process Improvement in Legal Operations

"You can design configurable intake forms that prepopulate data from existing records to reduce errors and speed intake. Forms can present dynamic, context-sensitive questions based on previous answers that trigger workflows and automation driven by an event system with notifications."

Company Name Brand
Onit, Inc.

Product Name Brand(s)
Enterprise Legal Management (ELM), Apptitude, Billing Point, InvoiceAI

Latest Developments and Updates
- Artificial intelligence (AI)-enabled features help legal operations modernize invoice review.
- Machine learning and AI help source outside counsel at competitive rates.

Improve Your Project Efficiency
Onit's Enterprise Legal Management (ELM) is a comprehensive and configurable legal management software solution for improving the efficiency and productivity of legal operations. Onit ELM runs on Apptitude, the company's core platform for enterprise application development, and is hosted on Amazon Web Services (AWS). Apptitude supports workflow, collaboration, and automation functions, using agile project management and no- and low-code configurations for rapid app deployment. Apptitude also supports products for contract lifecycle management (CLM), legal holds, and customized business workflows.

Onit ELM streamlines legal operations workflows and drives process improvement using actionable dashboards, matter intake forms, notifications, matter records, electronic billing, and reporting.

Dashboards
Onit ELM consists of data-driven dashboards you can set up for individual preferences and user roles. The dashboard displays a user's work environment with essential and time-sensitive data to accomplish work efficiently and monitor the health of legal operations and projects.

Onit's out-of-the-box business intelligence (BI) and analytics capabilities leverage Tableau which drives Onit ELM's rich dashboards and best practice reports.

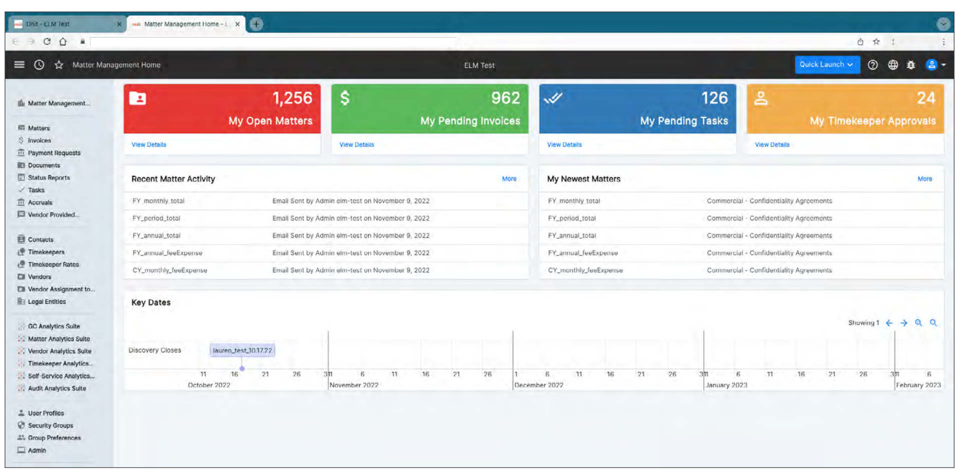

Figure 1: An example dashboard displays data on open matters, pending invoices, pending tasks, timekeeper approvals, key dates, recent matter activity, and a quick link to recent matters. The key dates section shows a timeline of tasks and events. You can drill down into the timeline and other graphics to see more granular detail.

> "Onit ELM can automatically generate an engagement letter that pulls vendor and matter data and sends the letter out for e-signature using Adobe Sign and DocuSign integration. When the vendor selection is confirmed, the vendor can start billing for the matter."

Dashboard visualizations provide vital and timely information on key dates, tasks, and recent activity. Users can also drill down to specific tasks, timekeeper data, pending invoices, and open matters to take prompt action. *See Figure 1 on the previous page*.

Matter Intake

Onit ELM has three methods for new matter intake. First, you can bring service of process records into Onit and create a case using integration with process-serving software from Wolters Kluwer CT and other providers. Second, business users can make legal service requests using intake forms available from a web portal, aka the front door to legal operations. Legal request forms alert staff to create new matters quickly. For example, when a terminated employee files a wrongful termination suit, you can make the matter in Onit with one mouse click. Third, you can design configurable intake forms that prepopulate data from existing records to reduce errors and speed intake. Forms can present dynamic, context-sensitive questions based on previous answers that trigger workflows and automation driven by an event system with notifications.

Notifications

Onit's event management system is the central nervous system, using notifications to direct work to users and limiting human interaction, intervention, and distraction. The base product is 80 percent configured to automate workflows and notify users of work. Still, the system is not constrictive nor limited and remains highly adaptable to wrap ELM around business requirements. Notifications are written in HTML and easily edited to insert logos, use color schemes, include specific data in the body, and add various action buttons.

Notifications keep people where they work and bring the data they need to accomplish tasks, such as required approvals for budgets, invoices, reserves, and settlements. The system tracks changes to records from notifications in a change log.

Matter Records

Matter records and other record types, like tasks, have five core elements: data, workflows, actions, collaboration, and participants. A consistent record type streamlines training and facilitates automated actions. Within any record type, you can configure variable and dynamic actions, customize workflows, post messages to the matter for other users, and set up participants to restrict unauthorized access.

When you create a task record, Onit presents the core elements you can use to set up participants and take actions, such as creating workflows. Participants can be external to the legal department or the organization and participate in a workflow using single sign-on (SSO) or a user ID and password.

Intake forms can drive matter workflows and automation. For example, when you take action to assign a law firm or vendor to a matter record, Onit presents an intake form to submit with characteristics to configure. This intake form identifies the

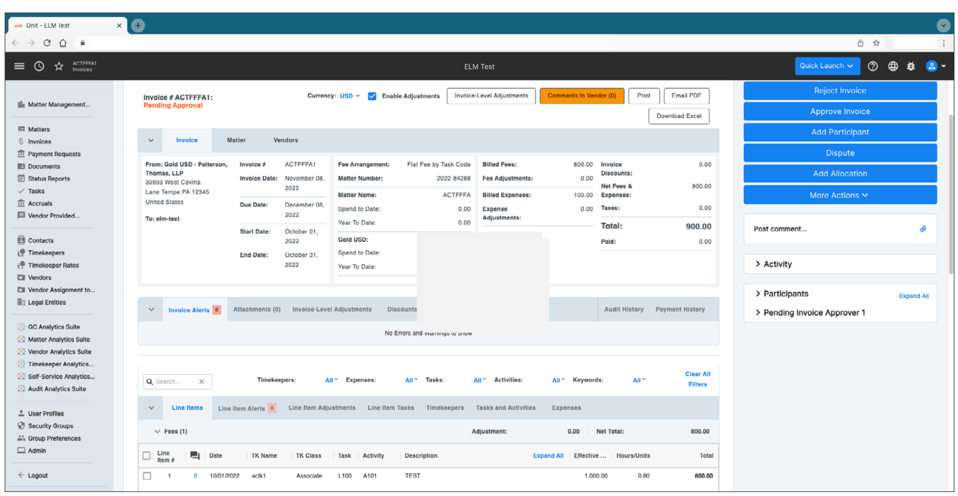

Figure 2: ELM displays invoice data like other Onit records and empowers you to take various actions to adjust line items, kick off approval workflows, and collaborate with staff.

> "BillingPoint enables law firms and vendors to manage timekeepers and timesheets and submit invoices via a web portal. The e-billing portal supports a rules engine to enforce invoice compliance and track exceptions to line items."

vendor and lead outside counsel and chooses the invoice currency, invoice audit rules, fee arrangement, and whether to collect a budget from outside counsel.

Layer in all the automation points you want when assigning a new vendor to a matter, such as triggering workflows for panel or non-panel firms. Onit ELM can automatically generate an engagement letter that pulls vendor and matter data and sends the letter out for e-signature using Adobe Sign and DocuSign integration. When the vendor selection is confirmed, the vendor can start billing for the matter.

Electronic Billing

Each Onit ELM customer has a BillingPoint instance. BillingPoint enables law firms and vendors to manage timekeepers and timesheets and submit invoices via a web portal. The e-billing portal supports a rules engine to enforce invoice compliance and track exceptions to line items. The system can reject invoices that fail audit rules and otherwise handle issues by alerting reviewers to anomalies or automatically adjusting a bill.

The billing portal accepts Legal Electronic Data Exchange Standard (LEDES) bills. For vendors who don't use LEDES bills, the portal allows them to key in line items and build a compliant LEDES file. BillingPoint has real-time collaboration features for legal operations to communicate with outside vendors. The legal department staff and outside law firms can simultaneously review and comment on invoices.

BillingPoint gives reviewers different ways to interact with invoice data. Move through an invoice by adjustments, line items, timekeepers, expenses, tasks, and attachments. *See Figure 2 on the previous page*.

InvoiceAI uses machine learning and natural language processing (NLP) with Onit ELM rules to process invoices accurately and efficiently. It reads the white space between invoice rules, looks for cost savings, and can report in Tableau. For example, if a timekeeper codes a task as litigation but the line-item description includes round-trip travel between two cities, Tableau will present the discrepancy for review.

Reporting

Customers generate reports from a grid view and Tableau. Similar to Microsoft Excel, you can search, organize, and report data from a grid view of all invoices where every column is a field, and every row is an invoice for you to filter, move, and insert or remove columns to build data sets and save the view. You can run bulk actions in grid view, such as approving invoices. All users can access a library of preset report views to configure and save. Once you save a view, new data will update the view in real time.

Onit ELM also uses Tableau for reporting, including nine report suites comprising approximately 60 industry practice reports. *See Figure 3*.

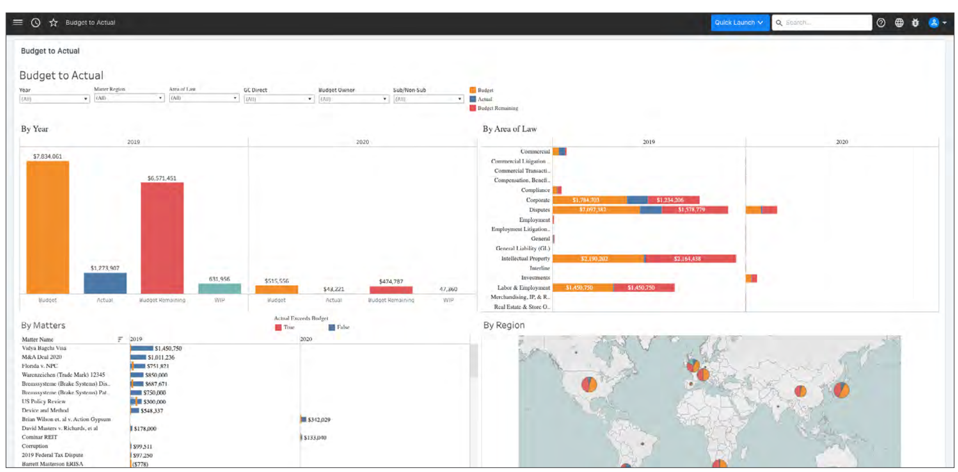

Figure 3: Onit uses Tableau to generate visual reports and data-driven dashboards.

Onit is enhancing the default reports with new best-practice reporting templates and refreshing the user experience with new visualizations.

Integration

Onit develops deep technology partnerships, such as with iManage for document management and Tableau for reporting, BI, and analytics. When you create a matter in Onit and iManage is part of the technology stack, iManage creates a workspace with the same name as the matter and provisions users according to Onit ELM's access restrictions. With this integration, you can use iManage's full feature set within a matter.

Onit ELM supports an application programming interface (API) for enterprise users. The system can use an OAuth API data-as-a-service (DaaS) to call and deliver an entire data set into a customer's BI tool.

Pricing

Onit charges a one-time implementation cost and a recurring annual subscription for Onit ELM based on a legal department's maturity, size, and legal spending with outside counsel. With a subscription, a customer gets several customer service hours to use. Onit does not charge for ELM user-access licenses or seats except for Tableau, but only a small subset of staff needs Tableau to create reports.

Who is Onit?

Onit is a global provider of workflow solutions for enterprise legal management and contract lifecycle management. The Houston-based company employs more than 650 people worldwide, supporting approximately 2,800 corporate customers, 13,400 law firm customers, and 41 Fortune 100 customers. The company has US offices in Austin, Mountain View, New York, and Santa Barbara and worldwide in London, Frankfurt, Kyiv, and Pune. Onit's AI Center of Excellence develops the artificial intelligence, Precedent, used for Apptitude and Onit ELM and is in New Zealand. Onit-owned companies include AXDRAFT, Bodhala, BusyLamp, SecureDocs, and SimpleLegal.

Why Buy Onit ELM?

- Onit offers ELM on its Apptitude platform, enabling custom workflows, collaboration, and automation.
- Onit ELM presents a front door to legal operations for employees to make work requests, create matters, and get status updates.
- An event management system enables data-driven automation with configurable notifications.
- Electronic billing features support automation and AI to streamline invoice review and reduce costs.

See Onit Enterprise Legal Management Today!

Learn how Onit's comprehensive and configurable ELM solution can help legal operations streamline workflows and drive process improvement. Talk to an expert today.

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