

MATTER MANAGEMENT PLATFORM

A **Smarter Law** solution that gives you better visibility and control over matters

Better control over matters. Improve the way your team works.

Our Matter Management Platform is a key part of our SmartStack technology solution. The Matter Management Platform will help you manage your portfolio more easily and efficiently. It offers fast, secure and transparent web access to your matters. With our forms, decision trees and legal operations app plug-ins we develop specifically for clients you can also use it to save time by automating some low-value work.

Managing your portfolio of legal work is challenging. You need details of a specific matter at a moment's notice but you also need to understand the bigger picture.

- What is your current portfolio position?
- What are trends you need to be aware of?
- Is your legal provider performing well against KPI's you have agreed?
- What matters need time spent on them now? and
- What are the key priorities you need to deal with.



Key benefits of the Matter Management Platform:



Portfolio dashboards and matter lists:

at-a-glance analysis of all your matters, using KPIs and metrics meaningful to you.



Access to matter details: Access to detailed information on any matter, including all related documents and emails.



Efficient collaboration: Find the right people to talk to on a matter. Which parties are involved? Who is the lawyer? Who is the responsible person in the business? Make easy contact using the 'click to call' and email functionality.



Electronic instruction: Quickly and easily instruct us with an online form. The form guides you through what we need to work on your matter straight away and improves the quality of the instruction.



Legal Operations apps: We provide apps and automation opportunities for your team. We can deliver decision trees, forms and document automation, incident reporting systems and workflow support.



Mobility: Access your information securely, anywhere on any device.



Portfolio dashboards and matter lists

Legal spend and matter dashboards for portfolio analysis

This example portfolio dashboard shows the distribution of matters and the legal spend. You can drill down to locate the related matters to discover more information.



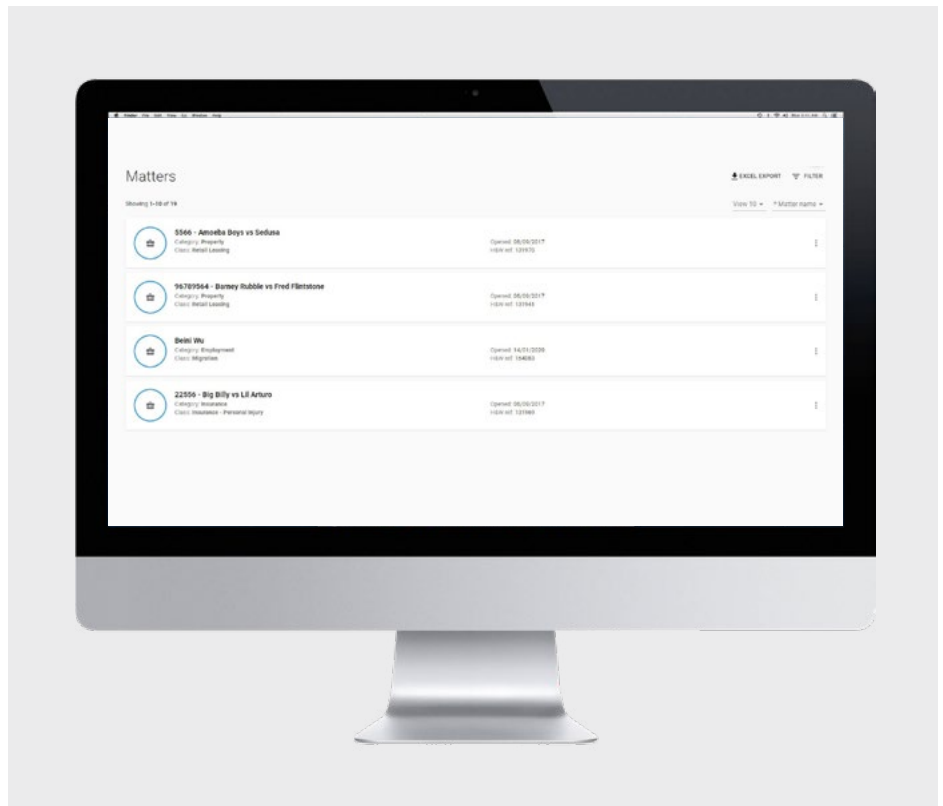
Matter type and instructor dashboard

This example dashboard highlights who instructed us, the types of matters and the monthly fees billed. These graphs are all customisable based on client requirements.



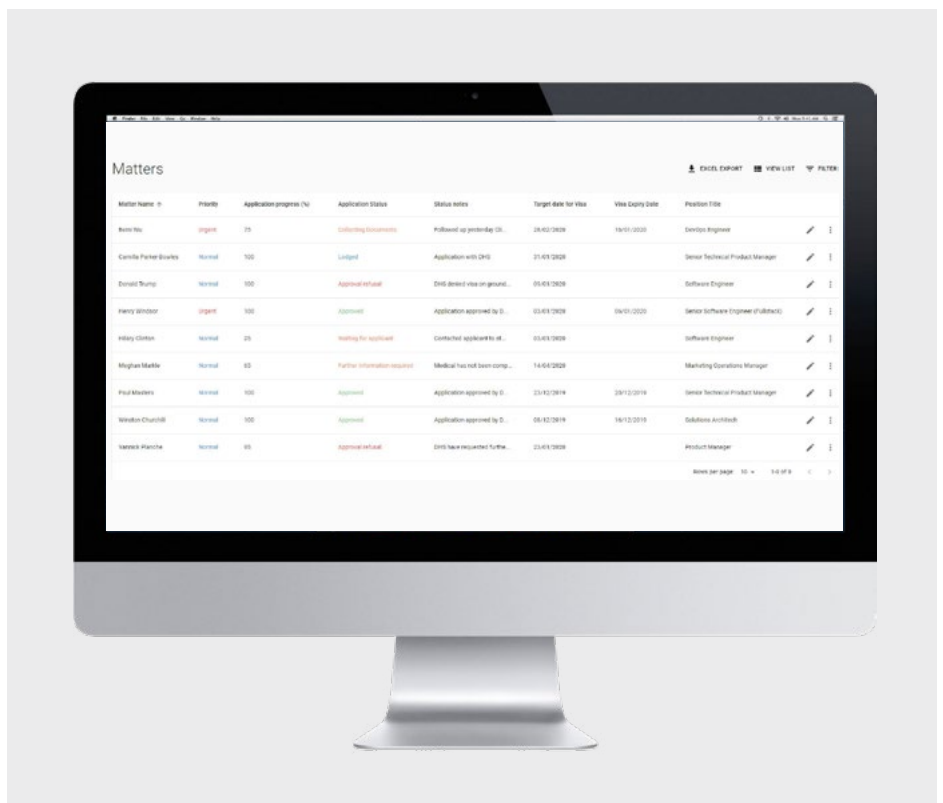
Drilldown into matter lists

You can open a list of the matters for further analysis, including access to detailed information at a matter level (including any related key documents or emails). You can define the fields important to you, and you can search by any field you like to rapidly filter and find information quickly.



Colour coding and configurable information

This matter list view shows the variety of engaging ways we can display information on your matters. Using colour, filtering and sorting allows you to quickly find what you need and spot trends.

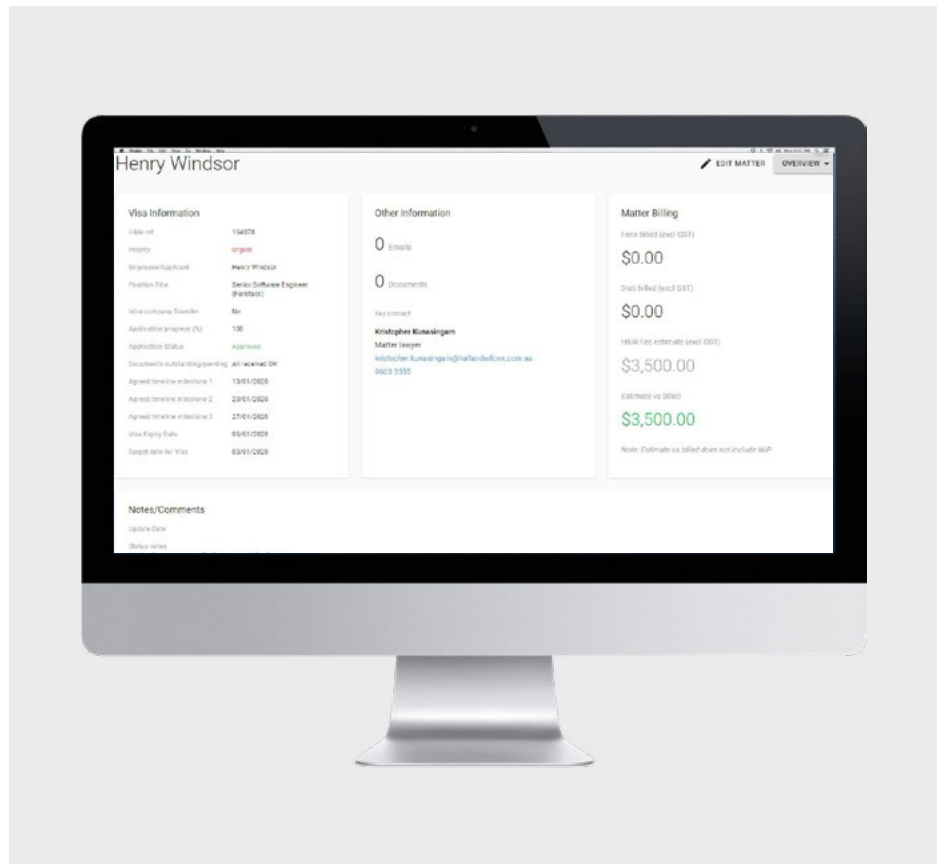




Access to matter details

Matter overview

Once you have selected a matter, the matter overview screen is displayed. This shows the information we hold on a matter. It includes details around billing, key matter information, the parties and the lawyer involved with your matter. This information is updated regularly by our legal teams. Some clients have certain fields on this screen they edit themselves.



Documents and email access:

Key documents and emails stored against your matters are available through the platform from the overview screen. You can view or download any document wherever and whenever you need it.



Efficient collaboration

Matter contacts and parties – find out the parties involved on the matter. Who initiated the matter? Who is working on it? Who is on the other side?

Quick contact function – click and connect with the lawyer working on that matter. The function creates a tailored email to give the lawyer context around the request, which allows them to respond quickly. There are also 'click to call' phone numbers available.

Task management – who has the next action on the matter? What is the status of the tasks on the matter?

Search through advices and emails on past matters, along with any other precedents or key documents.

Look up contacts in Hall & Wilcox to discover who to speak to at the firm for a particular issue.

View and run reports to extract matter portfolio lists.



Electronic instruction forms

The matter management platform also has a sophisticated and easy-to-use electronic instruction and document automation system. We present engaging, easy-to-use electronic forms for clients to complete. They can upload files, save and return to the forms later and then, when ready, submit. This enables us to clarify the information required to instruct us, reduce data entry errors and improve the quality of instructions. It reduces the time we take to act on a matter.

Sample 482 Visa Application

Here is an example of a complex form we built for a client who had work visa applications. A lot of our forms are simpler than this one, but this shows the power of our forms engine. Most forms for clients have 5 to 10 fields of information; some are mandatory fields, others are optional. Clients also appreciate guidance notes and the ability to upload documents to supplement the instruction. All these features are possible and easy to configure for a client's specific requirements.



Legal operations applications

Use our platform and expertise to help you automate low value work. See what work you can push back to the business by mapping out the processes and technology requirements with us.

Decision Trees and Document Automation:

We use the same rich functionality of the forms system to provide decision tree and document automation for our clients. You could present an electronic form to a business user, have them fill in the information and automatically generate a NDA, employment agreement, standard procurement contract or any other standard document. This feature can save the

legal team a lot of time they otherwise would have to spend on these low-value activities.

Legal Apps for your team to use

For example, we use a decision tree to help our self insurer clients assess if a workplace incident has common law potential using our award-winning CLEAR assessment app. Once an incident is flagged as higher risk, the CLEAR app helps the business user collect any evidence for future defence of the claim. This reduces risk and legal costs down the track. We built this app with a lot of input from our self insurer clients who helped co-create it.



Mobility

Our Matter Management Platform runs on any modern browser on any device. It can be accessed in the office on a PC, a tablet or on a mobile phone. Your information should be available securely anywhere so you can understand, manage and answer internal business queries on the matters we manage for you.

Continuous improvement – Evolve always

The Matter Management Platform is an important part of our service delivery. As our firm transitions more of its processes into the digital world, and as our relationship with you develops, we will transition more information, processes and insights into the platform. The platform will constantly evolve and we intend to work directly with clients like you to ensure that it becomes even more useful for you.

Get started

Contact Hall & Wilcox to arrange a meeting or visit the website for further information.

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