Legal requests

Bring speed, ease, and collaboration to matter intake

Legal Requests makes it easy to streamline requests for legal work, by both legal and business users, to manage matter intake in a simpler, standardized way.

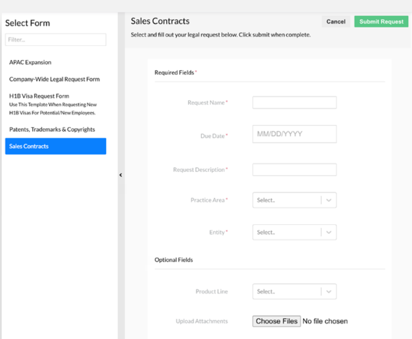
Put an end to unofficial legal work requests, such as requests made through Slack, email, SharePoint, in person, and even post-it notes, making it difficult to keep track of the details of legal service requests. Organize and automate the intake process with SimpleLegal so the Legal team can focus on higher value legal activities!

Control what information is collected and put a formal process in place, standardizing the way legal work requests are initiated, reviewed, and accepted.

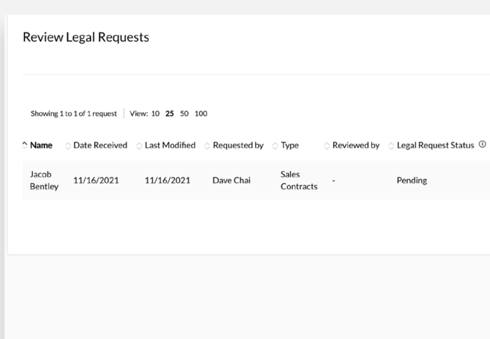
Key benefits

- **Streamline** and formalize the legal service request process.
- **Automate** the intake and approval/rejection process, with notifications at each stage.
- **Convert** approved requests into a trackable matter in SimpleLegal automatically.
- **Improve** communication and collaboration with other business units.

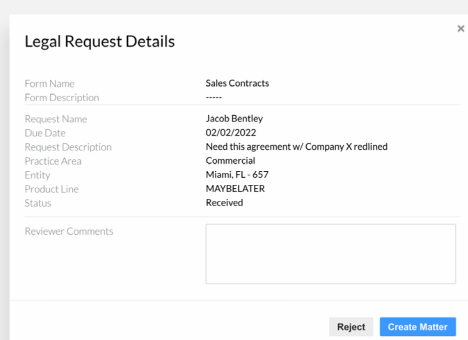
How it works



Configurable forms standardize requests and ensures any critical required information is collected.



After submission, details of the request is sent to the legal team for review.



The system administrator can approve or reject the request - if approved, the request will automatically be converted into a trackable matter in the system.

Once the request is approved

Information is mapped

If the request is approved, a matter is created and SimpleLegal takes the information collected from the form and auto-populates it on the matter. This removes redundant data entry and saves time so the legal team can focus on achieving good outcomes.

Organize matters

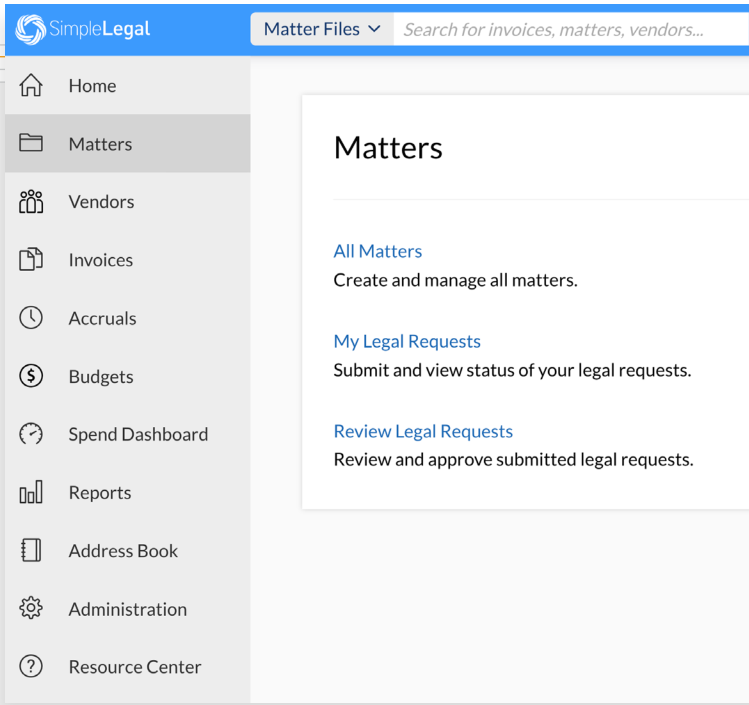
After approval, the legal request is automatically converted into a trackable matter within SimpleLegal, where you can assign attorneys, refer to a vendor, load important documents, and more!

Best practices to implement Legal Requests

- Start by creating basic forms, depending on the legal team's common practice areas - determine what information is needed to process, review, and complete a matter.

  Example form types include:
  General Advice
  Employment Issue
  General Contracts/Agreements
  NDA Request
  IP Request
  Litigation Request
  Visa/Immigration Request

- When creating forms, there are options to set questions as required or optional to ensure an adequate amount of information is collected.
- To ensure the right information is collected, make responses to questions a drop-down option. Allowing free form responses to questions may lead to ambiguous answers, creating more work for admins.
- For a clearer understanding of when a legal request needs to be completed by, include a datepicker to help legal teams prioritize work.



Ready to use Legal Requests?

1. **Turn on Legal Requests.** A SimpleLegal Customer Success team member can enable the Legal Requests feature.
2. **Admins go through a training session** to learn how to create forms and review submissions.
3. **Once Legal Requests is activated**, there will be new sections in the 'Matters' section of SimpleLegal.
   - **All Matters:** All active matters will now be listed here.
   - **My Requests:** View the legal requests you have submitted, along with status.
   - **Review Requests:** View submitted requests, and decide to approve or reject (only available to admins).
4. **Easily manage all template forms** and create new ones under the 'Administration' section (only available to admins).

To learn more about how to use SimpleLegal's Legal Requests feature to better manage your matter intake process, please contact success@simplegal.com.

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