



Enhanced Reporting

January 19, 2022

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Housekeeping items

- All attendees are muted
- Please ask questions using the Q&A feature
- If we do not get to your question during the session, we will follow up with you afterwards



Meet the Speakers



**David
Chai**

Sr. Product
Marketing Manager



**Laura
Sneddon**

Director of Product
Management

Agenda

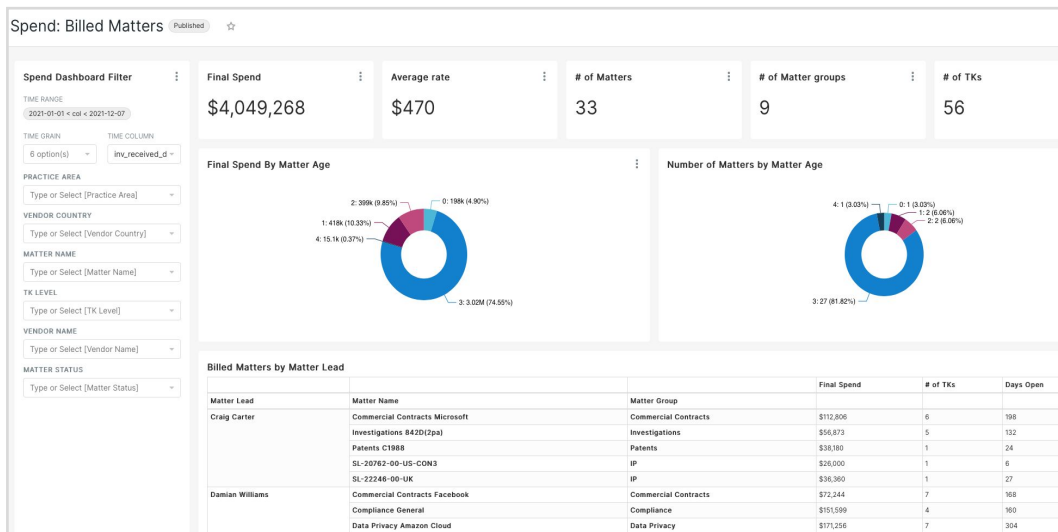
1. What is Enhanced Reporting?
2. Why we are doing this
3. When Enhanced Reporting is coming
4. Future roadmap
5. Product Demo
6. Q&A

What is Enhanced Reporting?

Enhanced Reporting is the next evolution of SimpleLegal reporting.

Intuitive, and easy to learn for those familiar with reporting tools

- Create your own reports from scratch
- Modify existing reports to customize
- Use custom attributes in reports
- Create dashboards
- Access a refreshed library of spend and matter reports



Why are we doing this?

- We heard you loud and clear!
 - Reporting to be easier
 - More flexible capabilities
 - Creation of reports without needing a technical resource
- To provide a better customer experience
 - Make reporting easier, faster, and more comprehensive
 - Ensure customers can uncover the insights hiding in their data

Product Demo

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What's coming down the line?

- More datasets
 - Additional standard reports
 - More options for self-authoring reports
- Subscribe to reports and receive them on a regular cadence
- Automated alerts that trigger once a threshold to a value (like \$ amount) is reached
- Report enhancements to improve visualizations and data interpretation

When can Enhanced Reporting be expected?

- 2 beta programs are underway now w/ dozens of customers
- Launch will depend on what we learn from these betas
- Tentative plan is to rollout reporting in the 2H of 2022 but this can change

Questions?

Farewell & Happy New Year!