

# Intake and Matter Management Tool

*Legal Operations Consulting*

Streamline work management and enable data-driven decision making



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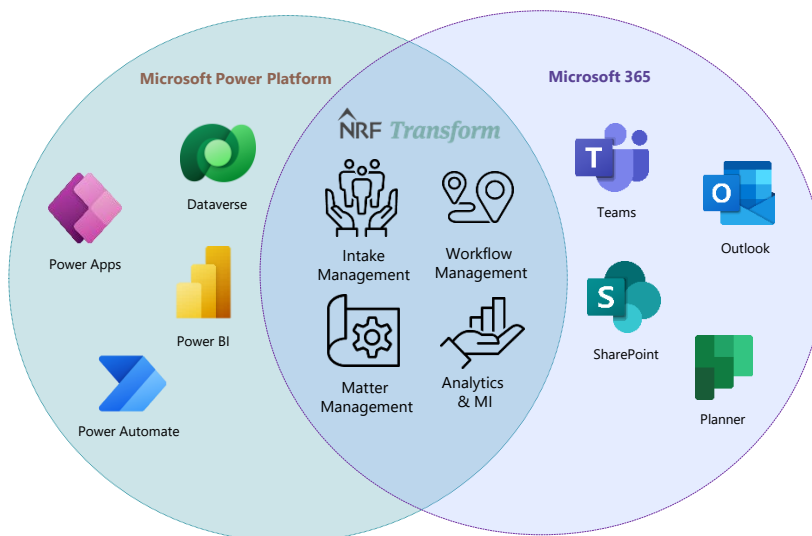
**Without a well-designed process for work intake, in-house legal teams struggle to handle requests from the business effectively. This leads to a lack of data-driven decision-making, time wasted on admin and poor prioritisation of work.**

**Our new Intake & Matter Management solution helps in-house counsel to manage work intake, matters and work allocation more efficiently.**

For any legal department on a journey to becoming a strategic business partner, the first step should be setting up a legal front door for the business. This will give you the data to back up your asks for extra budget or resource, and evidence your value to the business.

We have developed a unique offering to optimise how your legal team works – a tech solution, built on Microsoft, which drives efficient intake and matter management, bundled together with Legal Operations Consulting support to ensure successful implementation and process design.

Most companies use Microsoft daily. Lawyers have always relied on the Office suite (Outlook, Word, Excel, PowerPoint) and more recently, Microsoft has expanded to include the 365 applications, such as Teams, Planner, Power BI etc. This solution is built on Microsoft to leverage existing behaviours and licenses, keeping costs to a minimum. With our tool, there is no need to reinvent the wheel or change your ways of working.



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## The benefits

You will evidence the value of your function as a business partner thanks to our solution providing the following advantages:

- ✓ Leverages **Microsoft 365 licenses**, reducing costs and implementation time
- ✓ **Seamless integrations** (to Outlook, SharePoint, Planner, Teams): effortlessly re-uses data and stores information in one place
- ✓ **Fully customisable** to incorporate your existing processes
- ✓ **No ongoing license fees** & less reliance on third party vendors
- ✓ **Scalable solution**: suitable for enterprise-wide process automation
- ✓ Improves **efficiency and quality** of your legal service delivery
- ✓ **Secure data**: hosted on your systems or NRF's systems
- ✓ Establishes an **intuitive** intake process using a **consistent** taxonomy
- ✓ **Data-driven decision-making**: evidences your department's value to the business, measures operational efficiency and mitigates risks
- ✓ **Improved visibility** and fairer work allocation
- ✓ **Reduces administrative burden** & encourages self-service - focus on higher-value, more strategic work

## Why NRF?

Our award-winning Legal Operations Consulting and Applied Tech teams offer an unrivalled blend of expertise in legal operations processes and strategy advice as well as technology solution building and implementation.

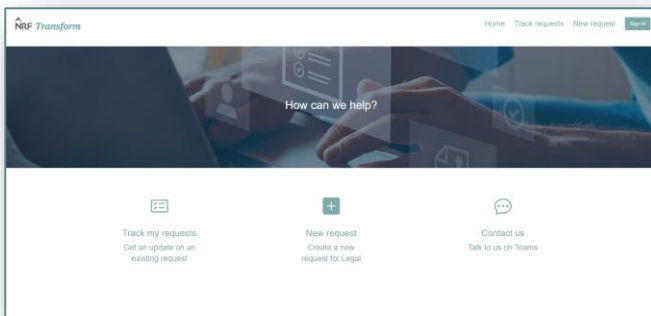
Technology alone is not enough to transform your work intake, allocation and matter management processes. To reach its full potential, the tech solution should be effectively embedded within a well-designed process, aligned with the wider business strategy and integrated with your data strategy.

NRF Legal Operations Consultants are on hand to deliver these key work streams alongside the seamless tech implementation and customisation by our leading technologists.

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## Streamline work management and enable data-driven decision making

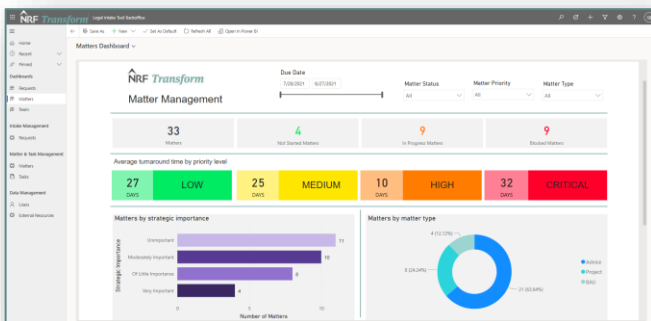
### The solution



An easy-to-use website for your business clients

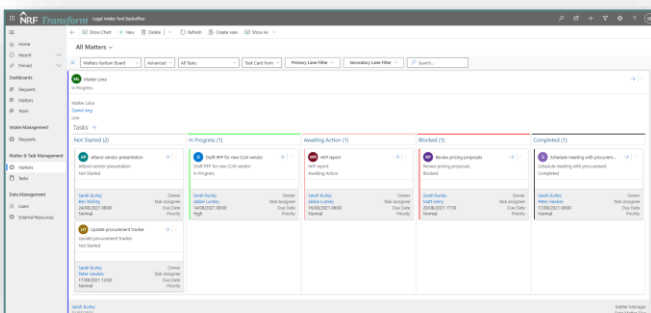
We have built a solution that makes the most of your Microsoft platform by streamlining these processes:

- **Intake Management:** Business clients submit and track requests through the website, accessible anywhere at any time



Visualise your requests, matters and workload

- **Workflow Management:** GCs and Senior Legal Counsel manage workload and allocate tasks using Kanban boards and workflow automation



Manage projects and track matter progress

- **Matter Management:** Team members progress matters through the lifecycle, store key documents and collaborate with each other to do the work

- **Analytics & MI:** Dashboards display live data insights on requests, matters and team workload

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## The value proposition

	Core	Plus	Premium
Overview	Budget certainty and deliverables-based approach	Hybrid model balancing flexibility with budget certainty	Versatility and convenient payment terms, enabling you to access specialist support as your needs evolve
Implementation support	✓	✓	✓
Budget certainty	✓	✓	✓
Clear timeline	✓	✓	✓
Ongoing tech support	✗ No recurring fee post-implementation	✓ 3 months minimum	✓ 6 months minimum
Ongoing consulting support	✗	✗	✓ 6 months minimum
Flexibility to extend support period	✗	✓	✓
Core customisation	✓	✓	✓
Further customisation	✗	✓ Limited scope	✓



### Stéphanie Hamon

Head of Legal Operations Consulting  
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Stéphanie, Head of Legal Operations Consulting, was previously at Barclays where she headed up what would become the Legal operations team for over three years. Under her leadership the department won “Legal operations team of the year” at the 2019 UK Legal 500 Awards. When transforming your in-house legal function, Stéphanie is ideally placed to advise on improving the management of your legal department.



### Tammy Heydenrych

Legal Operations Consultant  
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Tammy, a Legal Operations Consultant, was formerly the Group Company Secretary and Senior Legal Advisor for Zurich Insurance’s Southern African operations. With 17 years experience within the professional services, corporate and start up environments, Tammy has extensive expertise in corporate governance, stakeholder management, strategy formulation, operational design and delivering business transformation projects.



### Ben Stirling

Head of Applied Technology  
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Ben, Head of Applied Technology, is charged with designing and developing technology-enabled solutions and legal products. Ben qualified as a solicitor in Australia before starting his career in technology. He has 17 years’ experience working with technology in a variety of law firm IT management roles across several technology functions, including Infrastructure, Programme Management and Application Development.



### Sarah Burley

Transform Consultant  
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Sarah, a Consultant within NRF Transform, works across both our Legal Operations Consulting and Applied Tech teams. A neuroscientist by background, Sarah has gained experience in process automation, solution building, resource management, legal technology implementation and strategy advice, both internally and with our clients.

## NRF Transform

**NRF Transform is our global change and innovation programme. It aims to make how we deliver traditional services more effective and efficient, and to provide entirely new solutions to our client’s most pressing business problems. It has over 150 staff in offices around the world, as well as 3 dedicated Hubs, and includes teams focusing on Applied Technology, Innovation, Legal Design, Legal Project Management, Legal Operations Consulting, Resource Management, and Commercial Management.**

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