



Getting Started with **Legal Intake** and Matter Management

A Guide for
In-house Lawyers



THOMSON REUTERS®

Open the door to a better workflow



Today's legal landscape is faster and more competitive than ever before with demand for legal services increasing alongside the pressure for legal departments to be more efficient and responsive, while minimising risk. Leveraging artificial intelligence (AI) technology to meet these demands is the only way for General Counsel and Legal Operations Managers to effectively streamline end to end workflows.

A fundamental place to start is **legal intake** and **matter management**.

Legal intake and matter management are critical functions of any legal department. The *Thomson Reuters State of the Corporate Law Department 2023 Report* showed that

more than three in five

65%

legal departments have seen a rise in the number of matters they manage,¹

while

59%

are dealing with flat or decreasing budgets.¹

It's no surprise that cost control and improving efficiencies are among the top priorities for


31%

of respondents globally.¹



This guide will cover:

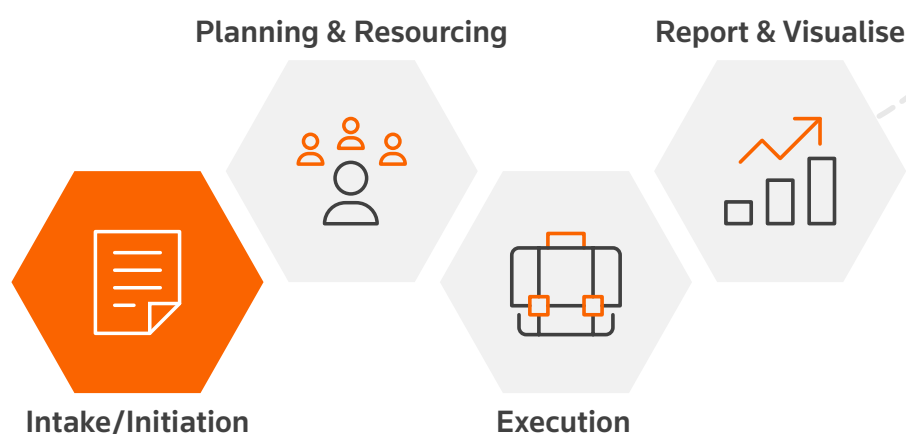
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What is legal intake and matter management?

Put simply, legal intake involves receiving and assessing requests from both internal stakeholders and external law firms and delegating the requests to the right person in the team based on expertise and capacity.

Legal intake activates the commencement of the matter management process, as illustrated in the diagram below. The matter is then managed throughout its lifecycle and includes tasks such as planning, resourcing, execution, tracking spend on outside counsel and reporting.



Intake as part of matter management

The intake process is the first interaction between the legal team and the person making the request, forming the foundation for the entire life cycle of the matter, so it's crucial to set it up for success.

We will explore the fundamentals of legal intake and matter management and highlight the reasons why digitalising these processes is necessary for today's modern legal department.



One of the immediate advantages is the effective automation of all the processes, which significantly cuts the time otherwise spent on admin tasks and emails.

InfraRed Capital Partners

An agile approach for General Counsel & Legal Operations Managers

As a legal leader within your organisation, you're expected to oversee a team that is efficient, data driven and digital savvy, while demonstrating the value of your department to the rest of the organisation.

The triage process for legal intake is often made up of time consuming and unbillable tasks, and it's difficult to improve efficiency using manual or disparate processes, such as emails and spreadsheets to track and maintain.

As they look to enhanced technological solutions and digitalisation to improve efficiency and lower costs within the department, over

50%

of legal operations respondents reported increased usage of technology in the last year.³



“

Our first use case [with HighQ] was matter intake...and one of the benefits...is we can do reporting very simply. Before it was a very manual process and now it's very much automated and that's been a huge benefit.

Tim Hewitt,
Associate General Counsel, Marelli

Technology can unlock many leadership benefits:

Improve your decision making

- increased visibility throughout workflow
- real-time reliable data and metrics
- minimised risk and liability with improved contract compliance

With artificial intelligence (AI) based workflow management and automation tools, you can share information easily across the team, access complete records, perform audits on demand and highlight potential risks from data cues.

Unlock your team's potential

- reduced errors and response times
- improve collaboration and minimising back and forth
- more time to spend on strategic work

With artificial intelligence (AI) based workflow management and automation tools, you can produce task and priority lists, obtain feedback, send out reminders, and track your team's progress — all without any intervention.



HighQ enables improved management reporting, as we are usually just reporting on the larger transactions, however HighQ assists with tracking all the matters that we work on... (including) the many time-consuming day-to-day tasks, so it really showcases (to management) the entire load the department bears.

**Richa Dewan,
Legal Department, Emaar Properties**

Legal management that matters

When you're managing legal matters, a well-designed project plan is essential to ensure efficiency, provide visibility and help tackle issues before they arise throughout the lifecycle of the matter. Most legal matters can be broken down into six fundamental elements:



1. Documents

every legal matter needs a centralised source of truth



2. Collaboration

connect and securely share with a multitude of stakeholders



3. Workflow

each matter is divided into stages and milestones



4. Management

matters are projects that need to be managed



5. Tracking

project progress and status, team capacity and spend tracking



6. Reporting

access to data and performance metrics

Harnessing the power of intelligent workflow for legal intake

1

Evaluate and triage legal requests more quickly and efficiently with onboarding templates to ensure you capture all the important information needed and reduce overall turnaround times. This will not only position your team as valuable facilitators but free them up to deliver more strategic value to the business.

Almost three in four legal department operations professionals

71%

see using technology to simplify workflows and manual processes as a high priority (the second highest priority).³

2

Enable self-service legal tools, such as checklists, guides and pre-approved templates to empower other business units to participate in the process. You can delegate standardised legal documents under controlled parameters to ensure they remain legally compliant every step of the way. This will give your department an edge and assist with their in-house legal confidence.

Over two thirds of legal departments

68%

either have a 'practical know how' software solution or were looking to procure one within 24 months of the survey.³

3

Mitigate risk exposure, through a completely secure and visible record and audit trail. You can access real time data, identify risk areas and share large, highly sensitive documents. This allows you to easily maintain compliance, achieve greater accuracy and connect to all stakeholders.

A shifting regulatory landscape has caused compliance to rise to the top of the global list of priorities for legal departments.

22%

of legal departments cite compliance/regulatory requirements as a current top priority.¹

A positive shift towards a better workflow



Technology powered by artificial intelligence continues to change the way legal departments operate in a positive way.

In 2022, more than half the legal departments

55%

surveyed by Thomson Reuters planned to increase technology use to improve efficiency and lower costs.²

The 2023 State of the Corporate Law Department report confirms that “many improvements have already been made...(and) for those law departments still in the midst of change or those that may have fallen behind the trends, focus on improving operations likely will remain strong.”¹

Effecting positive change in your legal department requires getting your team involved and invested in the change from the beginning.



Get people involved in the process. Make it a team project...it was a great proxy for our integration (success).

Tim Hewitt,
Associate General Counsel, Marelli

Start with self evaluation

Improving workflow starts with honest self-evaluation - reviewing what you have, assessing the challenges and understanding what you want to achieve, such as:

- Being able to communicate the value of a project or your team as a whole
- Enhancing the way you practice law through analytics
- Enabling artificial intelligence and machine learning
- Improving stakeholder experience
- Allowing for benchmarking to drive continuous improvement

Then, answer these questions

- How are legal matters or support requests initiated?
- How do you triage these requests?
- Are there routine approvals that are required by the legal department?
- What level of self service does your department currently offer?
- How do you ensure you are meeting your deadlines and budgets, and how do you report this back to business stakeholders?

Other points to consider:



Legal Intake

If your legal requests are being received via email, chat and phone:

- Consider a tailored, fully configurable intake form which makes the legal request process easier and more intuitive for your business stakeholders.



Matter Management

If your matters are worked on by multiple people, loosely and inconsistently tracked:

- Consider an inventory of status and finances of all types of matters, all depts and geographies



Matter Budgeting

If you are projecting what a matter should cost and not sure whether it's on, under or over budget:

- Consider setting defined financial parameters per matter and track spend vs budget at any time



File Storage & DMS

If you're often looking for final documents and struggling to connect relevant files and contracts on a given matter:

- Consider an 'out of the box' cloud-based repository

Complete clarity... with the right technology partner

If you want to effectively transform the way your legal department manages all matters with complete clarity and peace of mind, choosing the right technology partner is crucial.

There are many point solutions available in the market that perform well, however you're best to consider the longevity of the partner you choose, and how well the solution can integrate and grow with your organisation.

There is a myriad of functional considerations that will come to mind for your legal intake and matter management process, such as ease of use, ease of rollout, cost, peer feedback, IT support and the reputation of your technology provider. You will want a technology partner who can support you throughout the process and into the future.

The right technology partner (like Thomson Reuters) can open the door to many functional benefits, including:



**a technology solution
that fits your tech stack**



**access and manage all
the work performed**



be on budget



identify trends



compare to benchmarks



**report on business
outcomes**

What you can expect from Thomson Reuters

HighQ by Thomson Reuters includes a cloud-based legal intake and matter management solution that:

1. can be tailored to deliver exactly what your legal department needs today
2. can flex and scale to evolve with your business in the future.

You can think of HighQ as a legal operations toolkit of sorts, which allows you to take advantage of the platform's flexibility by accessing the point-solution-type tools as you need them.

Here is a snapshot of the solutions HighQ that can help streamline your legal department:



A reputation you can trust

Thomson Reuters HighQ powers over

100,000

organisations worldwide with our
dynamic technological capabilities.

Discover how our team of experts can support you with our onboarding and implementation, staff training and document creation service.

Ready to take the next step?

If you would like to learn more about our Legal Intake and Matter Management solution for in-house teams, book a demo with a HighQ expert.

Book your complimentary demonstration today

1. Thomson Reuters State of the Corporate Law Department 2023 report 2. Thomson Reuters State of Corporate Law Departments 2022 report
3. Thomson Reuters LDO Index 2022 report

HIGHQ™



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