LegalTech
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LEGAL OPERATIONS
BUYER'S GUIDE: 2023 EDITION

Legal Operations
2023 Buyer's Guide
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Welcome to Legal Tech Publishing's 2023 Legal Operations Buyer's Guide
By: Cathy Kenton and Brian Dalton

Cathy Kenton, CEO,
Legal Tech Media Group/Legal Tech Publishing

Technology for legal departments continues to accelerate. We see new products and solutions designed to improve productivity and collaboration with outside counsel each year.

The *Legal Operations Buyer's Guide* is the centerpiece of Above the Law's Legal Tech Non-Event platform. In addition to the Guide, you'll find the latest content, a product directory, and the ATL Non-Eventcast podcast series, consistently delivering relevant insights from some of legal tech's leading executives.

Downloading the Buyer's Guide is just a start. Come back often for up-to-the-minute coverage of all things legal operations and find answers to your questions.

To your success,

Cathy Kenton,
CEO, Legal Tech Media Group/
Legal Tech Publishing and

Brian Dalton,
SVP, Breaking Media

Brian Dalton, SVP, Breaking Media

Document Management

iManage

Comprehensive Document and Email
Management Enhanced with AI,
Security, and Governance

iManage

Comprehensive Document and Email Management Enhanced with AI, Security, and Governance

> **Legal professionals spend a considerable amount of time in Microsoft Outlook where all the functionality of iManage Work 10 is conveniently available."**

Company Name Brand
iManage

Product Name Brand(s)
iManage Work 10, iManage Share, iManage Threat Manager

Latest Developments and Updates
- Access iManage Work 10 for documents and email from Microsoft Teams* while maintaining DMS security and version control.
- Add links to iManage documents directly into Microsoft Teams conversations.
- Protect important legal documents from external and internal threats with iManage Threat Manager.

A Comprehensive Document Solution
Legal departments and legal operations professionals require more than a basic folder structure to store documents. They need a comprehensive *information* lifecycle management solution that covers all electronic files and records from inception to disposal. In addition to knowing how to find and search information troves, they need the ability to securely share and collaborate on files with internal and external users, automate routine workflows, and most importantly govern and track sensitive corporate work product.

iManage Work 10 is an intuitive cloud-based document and email management system to securely manage information assets. The iManage Cloud architecture also supports a suite of security, risk, and governance applications such as the iManage Threat Manager that offers continuous protection of sensitive data from internal and external threats.

Because it's browser-based, everything is available in iManage Work 10 from multiple platforms including Microsoft Windows, macOS, iOS, and Android. Users are not hampered by the device they choose to use to get their work done.
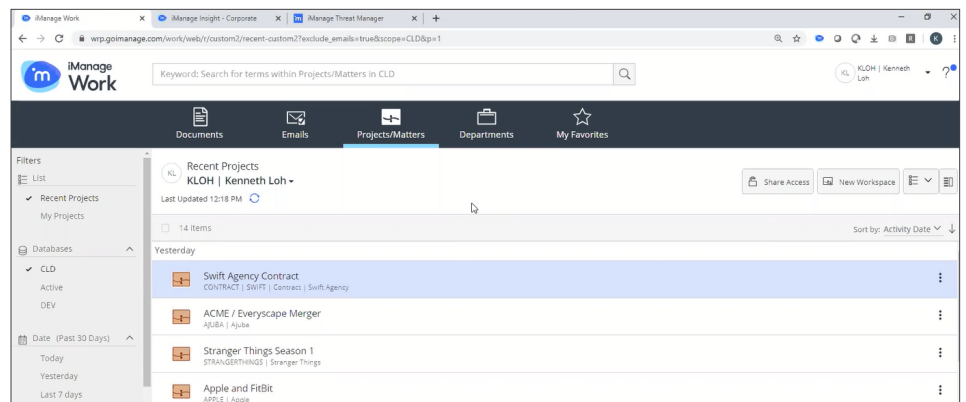
Figure 1: The web-based iManage Work 10 interface offers a list view and a classic grid view for people to pick and choose columns to display. Across the top, various dashboards can be selected to view Documents, Emails, Projects/Matters, Departments, or Favorites. The left panel indicates the available databases or libraries.

*iManage integration with Microsoft Teams is available exclusively to iManage customers on the latest version of iManage Cloud on Azure.

> **iManage provides two search options, Personalized and All. The results of a personalized search lists files that you have a prior relationship with.**

Managing Your Matters

Since most legal teams work from the concept of a "matter" or a "project," iManage Work 10 delivers a clean, intuitive, browser-based user interface (UI) to support that workflow structure. *See Figure 1 on the previous page.*

Matters contain folders, subfolders, and shared folders (blue with a people icon) for external collaboration. Each folder has a default document profile that automatically tags filed documents and inherits characteristics from parent folders to facilitate search and maintain security requirements.

iManage Work 10 can easily integrate with matter, practice, and contract management systems to create matching folders. Configurable project and matter templates can generate consistent matter views and set security and sharing parameters. When users utilize default folder structures and templates, work product becomes easily accessible from within any matter because the storage policies are consistent across the platform.

You Work in Outlook? No Problem!

Legal professionals spend a considerable amount of time in Microsoft Outlook where all the functionality of iManage Work 10 is conveniently available.

Most users set up an extensive array of Outlook folders to store and organize the multitude of messages they send and

receive every day, but those folders can't be accessed or searched by other team members. When you need to file a message and attachment to the iManage platform so that it's accessible to others, you simply link an Outlook folder to iManage. Then any message you put in that folder can be searched and previewed by others on the team. The iManage Work 10 panel in Outlook can be undocked so you can drag it to a second monitor.

iManage also offers a predictive filing agent that sits atop Outlook. When you select an email, the prediction engine recommends an iManage folder based on your previous filing decisions for similar messages.

Once an email message is filed into an iManage folder, the system displays a green check next to that email in every user's inbox so they don't waste time trying to file duplicate emails. That is all designed to save busy professionals time and mouse clicks which is one reason iManage is so widely used among legal departments and law firms.

File > Save

If you've created a new document in Microsoft Word, you can save it directly into iManage with the File > Save command. Instead of tortuously and manually navigating multiple levels of folders and subfolders, the iManage dialog box allows you to profile a document with pertinent information such as the relevant matter, version number, etc.
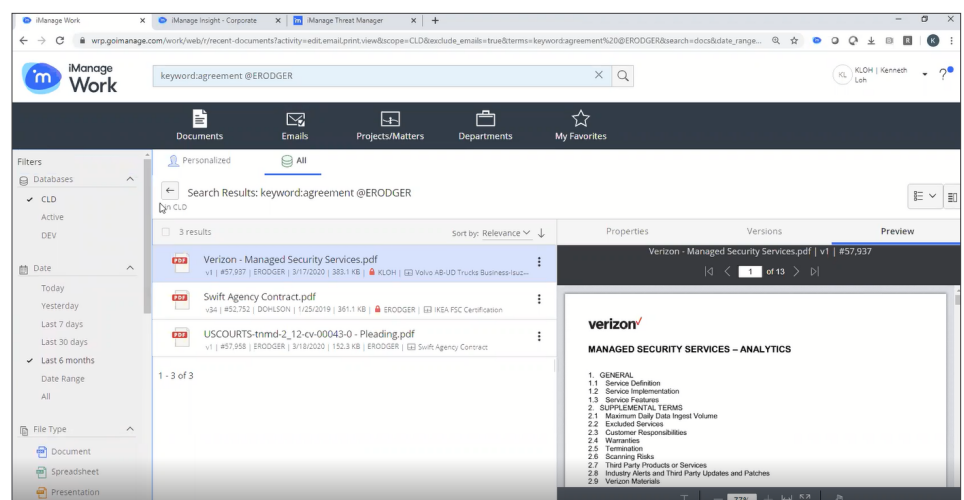
Figure 2: The iManage Work 10 search interface does not require a complex query to find content. Type in keywords and use the available filters in the left panel to narrow results and preview documents or email messages. The same search functionality is available in the Outlook panel.

> **iManage Share allows you to create shared folders in order to easily collaborate on documents with the finance department, human resources, or even outside counsel to assure those files are following your organization's data governance and security policies."**

Searching the Single Source of Truth

Search becomes most valuable when all of a company's documents and emails are in a central location – a single source of truth. If you've searched Amazon or Google, you'll be familiar with the general layout of the search window in iManage Work 10. PDF images stored in iManage are automatically scanned with optical character recognition (OCR) technology to search the full text.

iManage's search window is rooted in the context of the Work 10 dashboard and folder structure. Where you are in the system is where you search. Search parameters support full Boolean logic and proximity searching. The system provides two search options, Personalized and All. The results of a personalized search lists files that you have a prior relationship with such as matters and files you reviewed or edited in the past.

To expand a search, switch to the All list to narrow the results with filters in the left panel. Various filters are available depending on the files you're viewing. For example, for documents you can choose to see "all latest files," "last 7 days," etc. Or for email, you'll see filters such as "top senders." *See Figure 2 on the previous page.*

Share and Share Alike

Due to the sensitive and often confidential information handled by legal professionals, users need to define need-to-know access, or ethical walls, to easily define who can access specific folders, and block inappropriate access. But you can securely share documents, even with third parties, using iManage Share which is included with iManage Work in most Work bundles. That allows you to create shared folders in order to easily collaborate on documents with the finance department, human resources, or even outside counsel to assure those files are following your organization's data governance and security policies.

iManage Share folders are created with a single mouse click and appear as blue folders inside existing iManage Work 10 projects. Publishing content to those branded cloud folders is a simple drag-and-drop action.

When you attempt to attach a large file to a message in Outlook, iManage Share will suggest sending a secure sharing link instead to reduce the load on your email infrastructure. Your recipient receives a URL they can click to view the secured document. Using the shared link is safer than sending the file as an email attachment because iManage Share is auditable, trackable, and secure. *See Figure 3.*

Who Is Posing a Threat?

More and more today, legal professionals are getting pulled into discussions about cyber risk. Modern security threats come increasingly from hackers impersonating employees after stealing their logon credentials. That's one reason every document stored in iManage has a history timeline from creation to disposition which supports the necessary security audits.
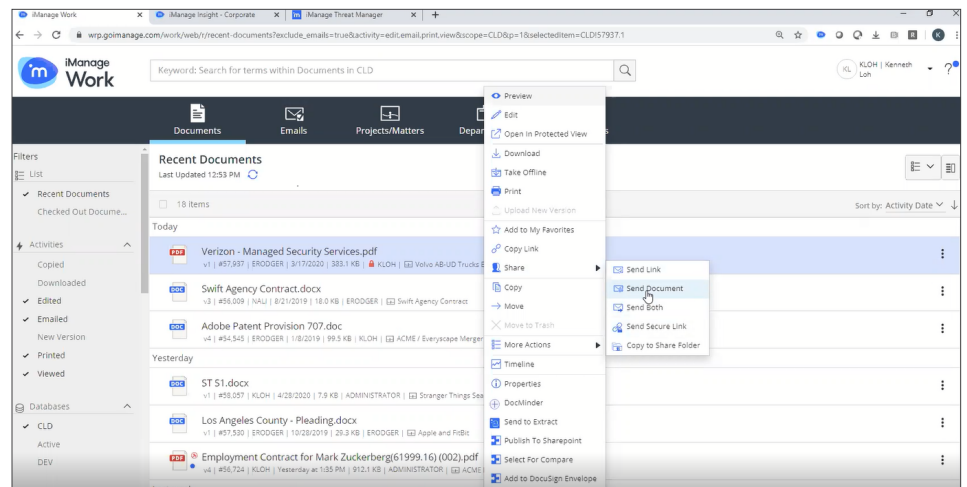

Figure 3: In iManage Work 10, right-click on a document to email the file or share it using a link. To secure content, administrators can disable right-click functions in order to force users to share a link instead of sending an insecure attachment.

Anytime someone edits, views, or prints a document, that activity is recorded and added to the history. iManage Threat Manager uses those document histories to build a digital fingerprint of each user and it can use that to help proactively identify active threats or even internal bad actors. It knows, for example, when someone is downloading an unusual volume of content. It also knows when someone who works in IP or Litigation is suddenly looking at content in M&A that is outside the normal behavior for that user. In that way, information stored in iManage becomes some of the best-protected information in the enterprise.

Pricing
The company prices its bundle of Work 10, Share, and Threat Manager for legal operations on a per user per month basis. Contract Intelligence comes in three editions: Essentials, Professional, and Enterprise. Each version unlocks feature bundles suited to different user roles and organization sizes. The Professional and Enterprise editions add services including machine learning training and support from knowledge engineers.

Who is iManage?
Founded in 1995, iManage delivers cloud-based services spanning document and email management, records management, governance, and security for leading law firms and corporate law departments worldwide. After several mergers and acquisitions, in 2015 the iManage leadership executed a management buyout from HP and the company settled into its headquarters in Chicago, Illinois with approximately 150 employees. Today iManage has grown to nearly 1,000 employees who support more than 2,500 of the largest law firms and more than 1,500 corporate enterprise and legal customers, including more than forty percent of Fortune 100 organizations and seventy-eight percent of Global 100 Law Firms.

Why Should You Consider iManage?
• Manage content and email communications to improve business processes such as contracts and claims in cloud-based matter files.
• Work efficiently outside the business unit with online collaborative workspaces to share content with corporate departments, outside counsel, and legal service providers.
• Apply information governance and security to critical work product without burdening busy legal professionals.
• Use AI-powered search to find previous work products, locate expertise, and gain insight into stored documents and email.
• Improve the overall productivity, agility, and security of your legal operations with a comprehensive document and email management solution.

Contact iManage Today!
It's essential to evaluate the capabilities and functionality offered by document management vendors and ensure they align with your legal professionals' specific requirements. Read through these 15-question checklists for evaluating a DMS to help you understand what to look for.
  Corporate Legal Departments
  Law Firms

Don't Be Caught Unprepared: Secure Your Data Against External and Internal Threats

By: Manuel Sanchez, Information Security & Compliance Specialist at iManage

Manuel Sanchez is an Information Security & Compliance Specialist at iManage with extensive professional experience in information security, governance, and compliance.

The days are long gone when sufficient cybersecurity meant simply installing firewalls and antivirus software. Cybercrime is on the rise, and experts estimate that the annual costs associated with it will reach $10.5 trillion worldwide by 2025. Organizations of all kinds are at risk for cyberattacks and should proceed accordingly to protect their sensitive information.

However, cybercriminals are only the start, as not every data security risk your organization faces will come from outsiders.

Information security can be complex and overwhelming, especially in today's rapidly evolving threat landscape. The best protection against security risks is understanding how every employee has a role to play in protecting information assets. Read on to learn more about the ways your organization could be at risk and the best practices you should adopt to secure your data.

Internal Negligence Can Threaten Your Data Security

Contrary to popular belief, most insider threats to organizational data are not bitter former (or soon-to-be-former) employees, but rather well-meaning staff who put data at risk through mistakes or negligence. The 2022 Cost of Insider Threats Global Report found that negligent employees were the root cause of 56% of cybersecurity incidents experienced by survey respondents. Human error, not malicious intent, was responsible for the majority of insider incidents covered in the report.

A good employee education program is key to reducing mistakes that could lead to data breaches. Security awareness training that is both engaging and relevant can help to expose common mistakes and allow employees to adapt security best practices into their working routines.

Employee Turnover Can Compromise Your Information

Soon-to-be former employees pose their own set of risks. Between the ongoing resignation trend and layoffs associated with current economic uncertainty, it's safe to say that employee churn is still high. This is more than a staffing and resource issue – it can also affect the security of your information. When employees leave, they may want to take your information with them. According to recent data, 53% of employees believe that because they worked on a document, it belongs to them. So, malicious or not, employees who leave may exit with confidential documents in (virtual) hand.

To combat this risk, organizations need to ensure that their internal policies cover the rules around company data and that these are clearly understood by all employees. Being fully aware that they are in breach of company policies should deter employees serving their notice from taking documents with them in most cases.

Remote Working Can Bring New Risks to Your Organization

Remote and hybrid work are here to stay. According to data from the Pew Research Center, before the onset of COVID-19, approximately 23% of individuals who were able to do their jobs remotely worked from home all or most of the time. In early 2022, that number had grown dramatically to 59%.

Although remote and hybrid working offer numerous advantages, they also bring risk. Many cybercriminals are targeting remote workers since home networks and personal devices are typically not as fully protected as ones in the office. Criminals also expect remote workers to have their guard down at home and take advantage of this by targeting remote employees with social engineering attacks like phishing.

Ensure remote workers complete security awareness training that will teach them to keep their guard up and avoid falling victim to the social engineering techniques used by bad actors to gain access to user credentials.

Remaining On-Premises Can Limit Threat Readiness
Not every legal organization has its own dedicated IT team. When they do have dedicated IT support, they are often focused on the routine maintenance of on-premises technology. Organizations of all kinds are constantly under threat, with the average seeing 497 cyberattacks every week. Software patching is one part of cybersecurity hygiene that helps reduce an organization's attack surface, but manually installing and distributing these updates is a big job for a small IT team.

Moving your document management to the cloud improves security while limiting the IT burden. With cloud solutions, most vendors offer unlimited updates throughout the license period. This eliminates the need for manual patching and ensures your technology always has the latest security updates.

Mitigate Risk in The Cloud
The greater security offered in the cloud goes beyond automatic patching. Contrary to what some believe, document management in the cloud is far safer than on-premises.

Modern enterprise cloud is fortified with such an array of cutting-edge defense mechanisms and incorporates such deep, layered security best practices that one of the most common reasons legal organizations share for their decision to migrate their data to the cloud is to reduce their risk exposure.

With infrastructures monitored 24/7/365 by expert, dedicated security teams, best-of-breed network and security tools as standard, and a battalion of sophisticated algorithms continuously examining and guarding data at every layer, no on-premises server network can offer the same degree of protection. Even if they could, the cost would be astronomical.

Furthermore, good cloud technology is built using Zero Trust architecture. Zero Trust is exactly as it sounds: security based on the need to verify every interaction – and nothing that isn't verified can be trusted. An individual's ability to access specific data, move around within the system, and view or modify data with differing permission levels relies on the ability of Zero Trust security checkpoints to validate that the specific user and the device they are using have the appropriate credentials to proceed.

A Unified Approach to Security
Breaches happen for many reasons, including gaps in security infrastructure,

willful or accidental actions by individuals, and incursions by external bad actors. Although migration to the cloud is an important step toward safeguarding your data, ultimately, your organization must develop a culture of security to benefit from the move fully. After all, people, both intentionally and unintentionally, are the weakest link of any security system. Clear protocols and good training paired with the right cloud technology are your best bet for keeping your organization's data safe.

About iManage
iManage is the company dedicated to Making Knowledge Work™. Its intelligent, cloud-enabled, secure knowledge work platform allows organizations to uncover and activate the knowledge that exists inside their business content and communications. Advanced artificial intelligence and powerful document and email management create connections across data, systems, and people while leveraging the context of organizational content to fuel deep insights, informed business decisions, and collaboration. Underpinned by best-of-breed security and sophisticated workflows and governance approaches, iManage has earned its place as the industry standard by continually innovating to solve complex professional challenges and enabling better business outcomes for over one million professionals across 65+ countries.

Artificial Intelligence (AI)

Filevine

Filevine Streamlines Legal Drafting
with Automated Templates, Document
Management and Assembly, and
Generative AI Tools

Filevine

Filevine Streamlines Legal Drafting with Automated Templates, Document Management and Assembly, and Generative AI Tools

> "You can share a live document template with others, including counter signers (no added license required), and assign them permission-based roles as owner, editor, proposer, or viewer. Each draft contract has a unique URL to send to reviewers via email, or you can paste the URL into a collaborative program like Teams or Slack."

Company Name Brand
Filevine, Inc.

Product Name Brand(s)
AIFields, DemandsAI, Filevine, Lead Docket

Latest Developments and Updates
- AIFields, a generative artificial intelligence (AI), generates text from curated prompts to summarize documents and answer complex questions.
- DemandsAI creates demand letters by AI-augmented Filevine-certified demand-drafting partners.
- Document assembly tool bi-directionally synchronizes data between .vine files and Filevine's database to auto-populate documents with client data, clauses, and other information.
- Visual document search with filters and real-time results list.

Master Operational Efficiency
Filevine is a modular software-as-a-service (SaaS) platform with legal case management software, lead management (Lead Docket), and document and contract management tools, including time, billing, and payments software, document assembly, and electronic signature workflows. The platform includes components to meet the needs of law firms, corporate legal departments, government entities, and niche law practices, such as criminal defense, immigration, insurance, personal injury, and mass torts.

For legal operations, Filevine can manage matters and projects, handle intake and workflow, and deal with all contract creation and administration aspects.
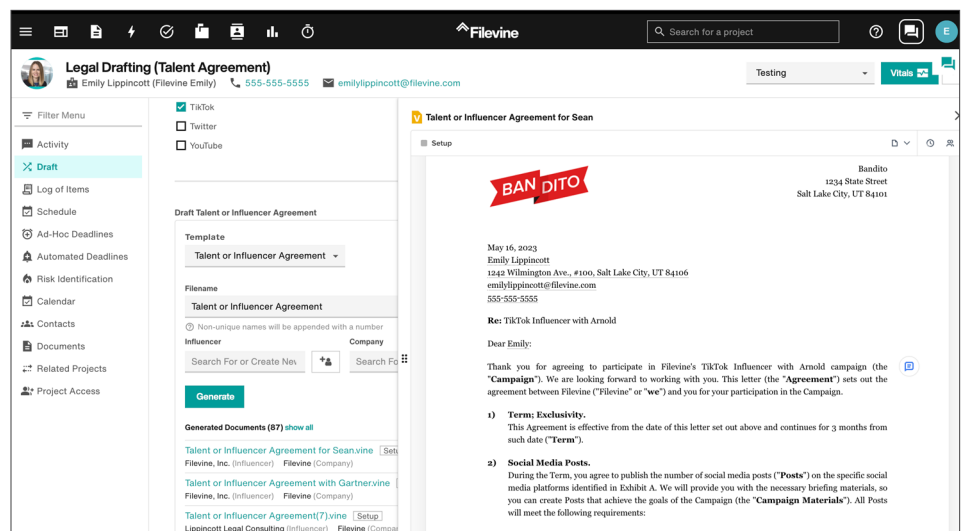
Figure 1: Filevine legal drafting assembles a legal document from a template of variable fields bidirectionally synchronized to the live, shareable draft document of completed variables of text, paragraphs, or clauses.

> **Filevine's document management features include automated workflows, document versioning, document locking when a file is open for editing, a document combiner or binder, and a Bates stamper. Clause-based reporting can find clauses frequently changed by users or ones requiring editing or removal because of a change in the law or client requirements."**

Project Management and Document Assembly

Each matter or project in Filevine has an activity feed, serving as a base point where people can check status, assign tasks, ingest email, and more. The activity feed consolidates all client and matter communication, supporting two-way texting and captured email. You can also use a Filevine plugin to drag and drop attachments from your Microsoft Outlook or Google Gmail inbox into the feed.

When you import email attachments, Filevine can take several actions you would expect from a secure, full-featured document management system (DMS). For example, Filevine's DMS automatically stores email attachments and uses optical character recognition (OCR) on ingested image-based text files like PDF and JPG. You can share documents and collaborate with others to create and edit them. Filevine also supports client portals to view shared documents and other materials pertinent to a case.

The Draft tab in the matter workspace supports **document assembly** from stored templates. Select a template, and Filevine surfaces variable data fields in the template to select and complete. The variables include draft type, notes, parties, expiry date, governing law, indemnification, and more. You can pick calendar dates and adjust variables using pull-down menus and field selectors to match legal requirements. As you complete the variables, the template

fills with corresponding words, paragraphs, or clauses – but not in the sense of a traditional merge document.

Along with the template of variable fields, Filevine displays the live, shared template to edit in real time with others. Filevine uses bidirectional synchronization between completed variables and the live template. You can continue completing variables to edit the document or work in the document space if you're more comfortable there. *See Figure 1 on the previous page.*

You can share a live document template with others, including counter signers (no added license required), and assign them permission-based roles as owner, editor, proposer, or viewer. Each draft contract has a unique URL to send to reviewers via email, or you can paste the URL into a collaborative program like Teams or Slack.

Filevine document assembly supports standard editing tools, such as commenting, deleting text (red line), and adding content (highlight), all in the context of clauses. Reviewers cannot simultaneously edit the same clause. When a clause is open for editing, a padlock button indicates it is locked, and the clause is grayed out. Besides editing text, you can add content before and after a clause, move a clause up or down in the document, toggle numbering, or indent a clause.

As you edit a template and insert paragraphs or clauses, a type-ahead
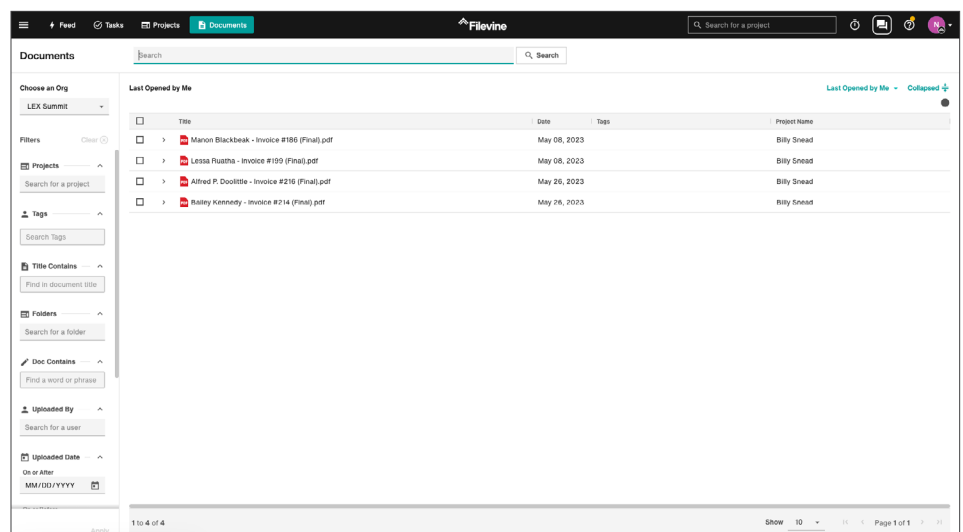
Figure 2: Filevine's visual search drills down into document sets using metadata filters so you can find just what you're looking for without using complex Boolean search strategies.

> **Filevine built a generative AI system, AIFields, that monitors specific fields on the platform and generates text based on curated and tested prompts. When you upload a document to a monitored field, Filevine can assign prompts, such as summarize, to act on a record, such as a police report, to provide a document summary."**

feature identifies approved content from a clause library to insert into the document. For example, your company or team may define work hours and indemnity clauses from other completed documents. When the type-ahead feature presents a similar clause or clauses to select, Filevine informs you of the origin of the clause.

Maintain control over the template using checkpoints for individual or group review. A checkpoint locks a document until all reviewers approve the draft and all comments are resolved. Filevine notifies reviewers via email and includes a unique URL to the document. The system tracks all document activity for review. It records the status to display the document phase, such as setup, review, and signatures requested, in the Documents tab of the matter.

Legal Document Management

From the Documents tab in a matter or project, view a list of documents with a preview of a selected file in the right-hand windowpane. You can expand the preview to show the entire record in one click.

Filevine also has a global view of all documents across all projects. In either view, a visual search with facets or filters, such as project name, tag, title, date created, and more, combines with a keyword search to drill down into document sets, providing active result sets based on the applied search filters. *See Figure 2 on the previous page.*

Save searches to a URL to recall the search criteria and results. Document access permissions are assigned at the project level and trickle down to the individual documents in list views or search results.

There's no need to log into another core system like Microsoft Word or Adobe Acrobat to edit files. Filevine's legal document management features include in-app Microsoft Word and PDF editing tools to delete, add, redline, comment, and redact documents – redaction permanently removes selected text and graphics.

Filevine's document management features include automated workflows, document versioning, document locking when a file is open for editing, a document combiner or binder, and a Bates stamper.

Clause-based reporting can find clauses frequently changed by users or ones requiring editing or removal because of a change in the law or client requirements.

To fully utilize Filevine's document management, documents and data must live together in the platform. Filevine can ingest documents from any DMS, such as iManage, NetDocuments, or SharePoint. On import, Filevine indexes documents and applies OCR to image-based text to make every document searchable.

AIFields

Filevine built a generative AI system, AIFields, that monitors specific fields on
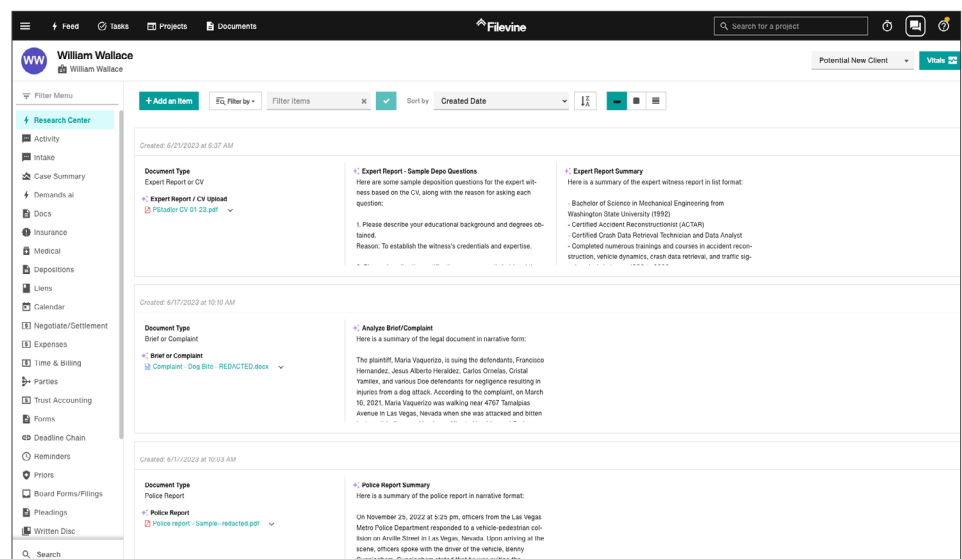
Figure 3: Filevine AIFields can summarize documents and run a deposition inconsistency finder for depositions.

the platform and generates text based on curated and tested prompts. When you upload a document to a monitored field, Filevine can assign prompts, such as summarize, to act on a record, such as a police report, to provide a document summary. Another prompt, deposition inconsistency finder, applies when a deposition is uploaded. *See Figure 3 on the previous page.*

Filevine's deposition inconsistency finder looks at every line in a deposition and fact-checks it with the entire document. Other AIFields can summarize loan agreements in M&A packages and score clauses or paragraphs based on an organization's risk threshold.

Integrations
Filevine supports native and partner integrations. Native integrations include billing and timekeeping, such as Intuit QuickBooks Online, communication tools RingCentral and Slack, and email and calendar integrations with Gmail, Google Calendar, Microsoft 365, and Outlook. Partner integrations are available for virtual receptionists, lead generation, client portals, and medical records and retrieval.

Pricing
Filevine pricing starts with the case management platform. The base software includes calendaring, contact and task management, unlimited document storage, guest access, time and billing, automated workflows, scheduled reports, and instant communication via email and SMS text. Document management, business insights with custom data visualization, document assembly, and integrations are paid add-ons.

Pricing is based on the number of users, add-ons, and integrations. Filevine tailors cost-effective and scalable plans to fit law firm or corporate legal department requirements.

Who is Filevine?
Salt Lake City-based Filevine offers cloud-based legal case management and contract lifecycle management software for law firms and corporate legal departments. The company also provides a lead management SaaS called Lead Docket. Ryan Anderson, Filevine CEO and co-founder, leads over 350 employees supporting over 65,000 users. In 2022, the company landed $108M series D funding led by the StepStone Group, Golub Capital, and repeat investor, Signal Peak Ventures.

Why Buy Filevine?
- AIFields generates text from curated and tested prompts that can stand alone or serve as input to document assembly workflows.
- Assemble legal documents from templates using variable fields that bidirectionally synchronize with live, shareable documents for collaboration and editing.
- Use built-in legal document management tools to edit and redact Microsoft Word and PDF documents.
- Find documents fast with visual search tools using metadata facets and keywords.

See Filevine Today!
Simplify the complexity of your legal document assembly and workflows with Filevine and its built-in generative AI system. Get your free demo today! ∎

Contract Lifecycle Management (CLM)

LINKSQUARES

LinkSquares AI-Powered CLM Puts Legal Ops Ahead of the Curve in Creating, Executing, and Administering Contracts

pramata®

Pramata is the Radically Simple End-to-End Contract Management Platform

LINKSQUARES

LinkSquares AI-Powered CLM Puts Legal Ops Ahead of the Curve in Creating, Executing, and Administering Contracts

> " **LinkSquares Contract Lifecycle Management (CLM) provides a contracting platform with artificial intelligence (AI) to give legal teams the tools to move their business forward faster. With LinkSquares, your legal department has what they need to collaborate, write better contracts, and analyze what's in existing contracts.**"

Company Name Brand
LinkSquares, Inc.

Product Name Brand(s)
LinkSquares Finalize, LinkSquares Sign, LinkSquares Analyze, LinkSquares Cloud, LinkSquares Prioritize

Latest Developments and Updates
- Create custom views of contracts from saved filters.
- Reduce template management and accelerate contract creation with dynamic language.
- Insert clauses into draft contracts in Microsoft Word and save clauses back to the library.
- Create multiple or bulk signature requests simultaneously.

Improving Contract Management to Drive Growth
Companies need legal departments involved in all significant growth decisions to protect their interests and guard assets. Yet, when the legal department gets involved, the inertia slows down other departments that must interface with legal to generate contracts and revenue. Legal needs more tools to use data effectively, work fast, and facilitate business.

LinkSquares Contract Lifecycle Management (CLM) provides a contracting platform with artificial intelligence (AI) to give legal teams the tools to move their business forward faster. With LinkSquares, your legal department has what they need to collaborate, write better contracts, and analyze what's in existing contracts.

The LinkSquares platform comprises three modules: Finalize, Sign, and Analyze. The Finalize module allows users to create, review, and approve contracts. Sign is an e-signature tool for managing and tracking agreement execution. Analyze is an AI-powered contract repository that organizes contracts and automates workflows.

Finalize
Centralize contract creation in LinkSquares Finalize and customize workflows with templates that allow users to make specific contract requests to the legal department or engage in self-service drafting.
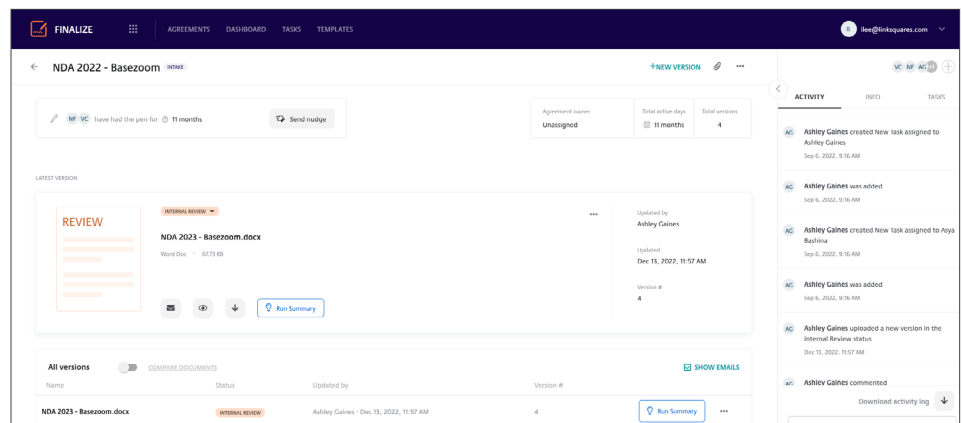
Figure 1: LinkSquares UI drills into contract details and displays real-time activity, collaboration, and tasks in a tabbed panel.

> **Templates can automatically fill variables and complete clauses based on select criteria, such as a user's role, location, and dollar amount. For example, LinkSquares Finalize can use a draft contract's dollar amount to complete the language in a limitation of liability clause."**

Contract Requests

Permissioned users select an agreement template from the user interface (UI) or create one from a generic template. Users can fill out predetermined questions for whoever submits the request. After the request is completed and saved, it follows a customized workflow or an ad hoc assigned flow. When users generate legal requests, the platform alerts the department with notifications via email and creates a task for one or more reviewers.

Users can quickly save time, find agreements using different contract lists or views from filter combinations, and reuse them with a button. Select a contract from a view to check the status and view real-time information from the right-side panel of the web browser UI. *See Figure 1 on the previous page.*

Contract Creation

Users can draft contracts from self-service templates using dynamic language that inserts text into draft contracts based on triggers and questionnaire responses. Administrators configure templates with pull-down menus for users to include specific clauses from question responses. Templates can automatically fill variables and complete clauses based on select criteria, such as a user's role, location, and dollar amount. For example, Finalize can use a draft contract's dollar amount to complete the language in a limitation of liability clause.

Users select templates from a library by searching its title or description and filtering by contract type or workflow set for your paper or third-party paper. The template presents contextual questions and options to include reviewers from inside and outside the organization. The platform runs AI over the document to parse or format data points or clauses that matter most to you or are required by a location or contracting parties.

Negotiation and Approval

Contract workflows allow users and counterparties to negotiate and approve contracts in the platform or via Microsoft Word using LinkSquares Microsoft 365 add-in. LinkSquares supports Microsoft Single Sign-on (SSO), so users can stay signed in to Finalize within Word and edit draft contracts there; changes automatically save back to the platform, which supports versioning. With the LinkSquares Microsoft Word add-in, a panel appears like the right panel in the web browser UI. Users can collaborate on a document using social media constructs (@username), track progress, assign tasks related to the draft or specific clauses, and add tags, such as one that gives "the pen" or control of the document to a reviewer. You can also use the right-side panel to insert standard clauses into a contract and select and save new clauses back to the library.

When you email draft contracts to counterparties, the platform assigns an ID number to each contract. When another party receives the document, they can mark it up using Track Changes in Microsoft Word or another redline function in their preferred app. Once they return the contract via email, LinkSquares automatically adds the redlined draft as the latest contract version. If a counterparty or review does not use Track Changes, Finalize

Figure 2: LinkSquares Analyze uses AI to ingest and administer contracts smartly. The AI optimizes search by analyzing all documents, extracting critical metadata, normalizing naming conventions, identifying contract types, and adding relevant tags.

> **"LinkSquares trained more than 120 algorithms to identify and extract contract information, including individual clauses. LinkSquares Analyze also supports proprietary optical character resolution (OCR) with human quality assurance."**

can compare the latest versions for you to view and approve changes. The platform records all events in the activity feed, which serves as an audit trail.

Sign

LinkSquares Sign is e-signature software to manage and track the execution of agreements. With Sign, you can access contracts, signature certificates, and audit logs and know what contracts are out for signature, who has "the pen," and who needs to sign to execute the agreement. If you need to send the same deal to multiple parties for signature, LinkSquares can generate multiple or bulk signature requests simultaneously. The platform stores each signature action in a single audit log and automatically saves signature certificates and signed agreements to the contract repository, Analyze.

Analyze

LinkSquares Analyze is a contract management repository where you can create parent-child relationships among documents. The linked hierarchical structure reflects legal relationships among stored documents, obviating the need for complex folder structures. For example, you can link addendums and schedules to a master services agreement (MSA).

LinkSquares AI uses the linked structure to generate a governing document summary, which provides a helpful overview and insight into understanding legal relationships. You can run reports on governing summaries to identify active terms and what terms overwrite standard contract language.

Contract Digitization

Select one or more PDF files and Microsoft Word documents, or choose a compressed zip file to upload contracts into Analyze. You can set the name and agreement type and assign tags. If you do nothing, LinkSquares AI will detect the information. It will also identify "smart values," such as "Survival or Post Termination Obligations Term," language that remains in effect after a contract terminates, and "Price Increase (Indexed) Clause," language describing how price increases from a specified index.

LinkSquares trained more than 120 algorithms to identify and extract contract information, including individual clauses. Analyze also supports proprietary optical character resolution (OCR) with human quality assurance. Once uploaded, you can view the original document and metadata before releasing it into the repository. *See Figure 2 on the previous page*.

Contract Update and Renewal

LinkSquares provides a calendar view of all critical dates identified and extracted from contracts stored in the repository. AI algorithms find auto-renewal clauses, opt-out dates, and more vital information to add to the calendar, providing a link to the original document. You can create email reminders to alert staff of key dates.

Search and Report

Analyze supports Boolean logic and fuzzy search capabilities, allowing you to search by agreement name and type, content description, contract type, and tags. You can layer on more complex filters to focus on terms extracted by the AI. For example,
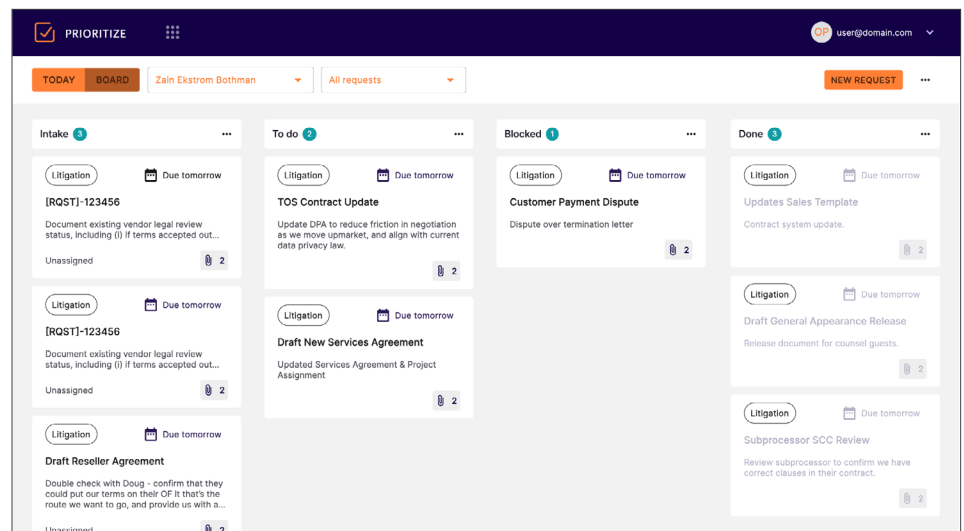
Figure 3: LinkSquares Prioritize provides a view of all legal tasks in process.

search for a particular clause across the repository and filter where specific language exists.

Run reports across all projects and drill down into the results with filters for agreement content, key milestones, date ranges, and more. You can view search results in preview mode and layer on additional filters. Analyze finds agreements associated with risk levels using clause, tag, and smart value analyses.

Export search results in CSV format to manipulate and visualize the data in Microsoft Excel or send the file via email. To further capture risk, create a tag and apply it to contracts according to your risk level.

Platform Administration
Administrators control the look and feel of the platform and set role-based user permissions. Admins allow access to documents based on their role, agreement types, and tags. LinkSquares can also use Active Directory user access controls and permissions.

Admins also create and secure self-service templates and workflows in Finalize using a no-code interface. The interface supports a token structure where admins can build questionnaires directly into workflows and publish them to end users to create contracts from question responses.

Integrations
LinkSquares lets revenue-generating departments interface with the legal department to start contract workflows and receive contract metadata where they work, including Microsoft Word and

Teams, Salesforce, Slack, and customer relationship management (CRM) systems.

LinkSquares application programming interface (API) for Slack notifies Finalize users of real-time activity in tasks, contract requests, comment mentions, e-signature, and more. The Finalize App for Salesforce provides real-time data synchronization and allows Salesforce users to trigger automation and tasks in Finalize to speed deals.

LinkSquares Prioritize
LinkSquares Prioritize is a legal intake and task management tool purpose-built to centralize the workload of in-house legal teams, empowering them to create, manage, and track tasks in one place.

View and manage all legal tasks in one place, from content review to agreement tasks and approvals, with a task management tool natively integrated into LinkSquares Finalize.

With a single place to consolidate and update tasks, legal teams can effectively prioritize their work to spend less time managing requests and more time focusing on high-value, strategic initiatives. *See Figure 3 on the previous page.*

Pricing: Buy What You Need
LinkSquares bundles its offerings along its core modules: Finalize, Sign, and Analyze. You can purchase them standalone or bundled together, and each module comes with the most frequently used features. Optional add-ons are available, such as application programming interfaces, integrations, smart value packs, and more.

You can also purchase one-time or ongoing professional services. Every purchase comes with the LinkSquares Cloud platform that includes LinkSquares AI, security, user management, notifications, dashboards, reporting, and the LinkSquares data model. Bundled offerings include onboarding and support.

Who is LinkSquares?
Founded in 2015 and based in Boston, Massachusetts, LinkSquares provides AI-powered contract lifecycle management tools for in-house legal departments. Led by CEO and co-founder Vishal Sunak, LinkSquares' 413 employees support over 1,000 customers across 65 countries. The company has attracted $161.46M through Series C funding led by G Squared (2022), Sorenson Capital (2021), and Jump Capital (2020).

Why Buy LinkSquares?
- LinkSquares Analyze uses AI-enhanced processing to identify, label, and tag contracts automatically.
- AI-generated governing summaries identify risk and surface critical data for search and reporting.
- LinkSquares APIs and native integrations speed up contracting workflow with data integrations for Salesforce, Microsoft Word, SharePoint, Slack, and more.
- Buy what you need and get up and running in as little as 30 days.

See LinkSquares Today!
See how LinkSquares can help you simplify your legal department's processes, reduce risk, save time, and increase profits. Request a demonstration today.

pramata®

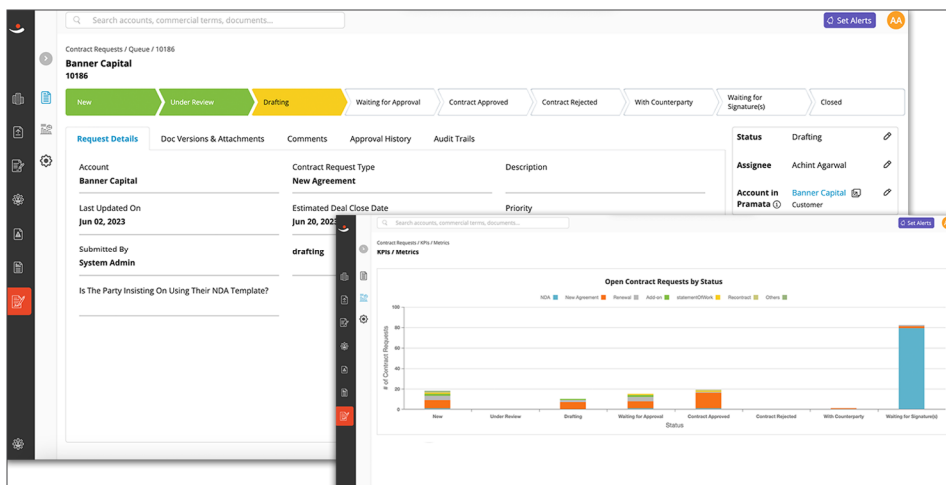# Pramata is the Radically Simple End-to-End Contract Management Platform

With Pramata You Don't Need to Hire An Army – Instead, We Do The Heavy Lifting For You.
Legal operations leaders are facing an uphill battle: deliver value fast with limited resources. The clock is ticking and traditional CLM approaches aren't cutting it. It's time for a change. It's time to "flip the script" on how to solve operational challenges and redefine a new era of legal efficiency.

Pramata helps you simplify the complicated. Our contract management platform starts by giving you the rich history of data hidden in your contracts for fast and impactful wins across the business. By starting with what you've already agreed to, you can quickly provide contract self-service and eliminate endless legal requests. Expertly design future state processes based on historical trends, and show clear, measurable improvement with critical KPIs. And with Pramata's unique, radically simple solution you don't need to hire an army – instead, we do the heavy lifting for you:

- Accelerate the contract process and template design by providing historical data from past agreements to give you a head start on new ones – moving deals forward faster than ever.
- Avoid delays and approval setbacks by giving centralized visibility to the agreed contract terms across all stakeholders.
- Easily configure dynamic request forms and monitor all contracts in flight, with an easy-to-use, centralized dashboard (even in CRM!).
- Empower your team with a simple workflow builder and legal queue to handle tasks efficiently, track status and ensure timely completion.
- Provide valuable metrics into team performance with customizable dashboards and reports to optimize workload distribution and identify bottlenecks.

For more information, please visit **pramata.com**

Company Name
Pramata
Find us on Linkedin

About
Pramata is the radically simple, end-to-end contract management platform. Pramata helps legal teams flip the script and get control and insight across every contract – fast and forever. With the only platform that does the heavy lifting for you, so you can get results in weeks, not months or years.

Our unique approach to contract management focuses on complete contract visibility, accuracy, and ease of access for legal teams and the broader business. Unlike most contract management solutions – we start by giving you the rich history of data hidden in your contracts for fast and impactful wins across the business.

Company History
Founded in 2005, Pramata was born of our CEO, Praful Saklani's own personal experiences and frustration with the complex contract process. Since then we have maintained our mission to ensure our highly adopted and intuitive platform continues to simplify contract management. As your technology partner we will make sure you always have a clean, centralized and searchable resource that empowers the business to self-serve their contract needs without legal intervention, from request to renewal.

The result? Legal teams can do more with less and focus on the work that matters.

Thank you for reading, let's keep in touch!

We appreciate the time you spent researching solutions for your law firm. New products, feature updates, and announcements happen throughout the year. So, to help you stay informed we have expanded Legal Tech Publishing's Buyer's Guide Series to include an eBook for nearly every product category. Subscribe to receive notifications when a new guide is released. Follow us on the channels below for updates and special virtual events.

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