ELM Solutions

Passport® Panel Management Module

Key Benefits

- Enables quick and easy administration of panels, member firms, and panel membership criteria

- Offers panel, firm, and performance data in one system, which gives legal operations professionals a big-picture view of panel metrics

- Facilitates quick and easy matter assignment to the appropriate pre-approved firms

- Ensures proper cost and quality assurance controls are enforced

- Enforces panel billing guidelines during invoice review, which controls costs and applies negotiated panel rates

- Aligns outside firms with legal and business goals, objectives, strategies, and risk tolerance

Engaging outside counsel and using them effectively is one of in-house counsel's most important roles. For many companies, depending on the size and complexity of the organization, and the resources available in your legal department, creating and maintaining a panel of law firms can help you get the best possible service and value for money, and can strengthen your relationships with your preferred outside firms.

While many organizations practice some form of panel management today, those that use enterprise legal management technology platforms such as Passport® to provide effective ways to capture key firm performance and value data points, delineate and organize their panels, and associate their panels to the correct matters have a distinct and clear advantage.

The Passport Panel Management Module gives clients the ability to create and manage panels, and associate matters to those panels for matter assignment. All of the matter details, firm ratings, matter outcomes, timekeeper rates, invoices and more for each firm are available directly within one system, allowing in-house professionals to easily and quickly compare different firms and make more confident decisions about firm selection, that affect the bottom line.

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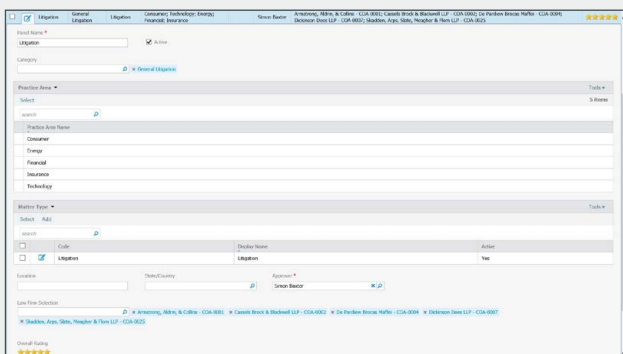
Passport Panel Management Module

The module impacts day-to-day matter litigation management activities by supplying in-house staff with point-of-decision data and processes to ensure the right firm is paired with the right matter at the right cost.

Key features of the Passport Panel Management Module include:

- Robust and intuitive panel management capabilities – create and manage panel criteria and member law firms.

- Customizable panel attributes – Passport includes the default criteria of matter type, location, and/or practice area, and provides the ability for organizations to define their own panel attributes.

- Panel(s) associated to matters – panels can be associated to matters that match the panel's criteria, presenting legal department staff members with a list of member firms to choose from for quick matter assignment.

- Automated firm approval workflow for non-panel firms – assigning a non-panel firm to a matter initiates an approval workflow, routing the firm through an approval process before they can be assigned to a matter

- Timekeeper rate definition and billing rules enforcement – users can assign panel timekeeper rates by role, and Passport automatically enforces panel billing guidelines during invoice review.
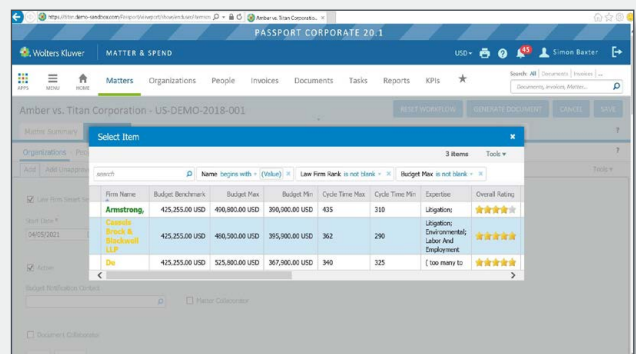
Passport Panel Management

Create and manage panels using the Passport Panel Management Module administration utility.

Passport Law Firm Smart Select

Assign matters to panel firms using the Passport Panel Management Module with Law Firm Smart Select ratings.

Wolters Kluwer

When you have to be right