

# Empower your enterprise legal management program with Passport®

Corporate legal teams face numerous challenges daily: increasing workloads without additional resources, controlling legal spend, producing positive matter outcomes, and a lack of data transparency to make informed decisions. Exacerbating it all is the corporate mandate to provide transition from a cost center to a value-driver for the business.

Wolters Kluwer has deep domain expertise, combined with proven experience in delivering scalable solutions, to address the objectives of enterprise corporate legal departments in alignment with broader business objectives. We understand the need for workflow efficiencies to streamline matter management, coupled with data-driven insights, to enable proactive spend and vendor management.

Passport is an enterprise legal management (ELM) platform designed to be adaptable to meet the unique needs of large corporate legal departments. By capturing all legal and spend data and documents in one consolidated space, it provides a single source of truth in a powerful legal ecosystem.

## Business benefits of Passport

- Simplify how your staff work
- Enable strategic, informed decision-making with full data visibility to improve internal and external law firm collaboration
- Adapt your platform as your needs change

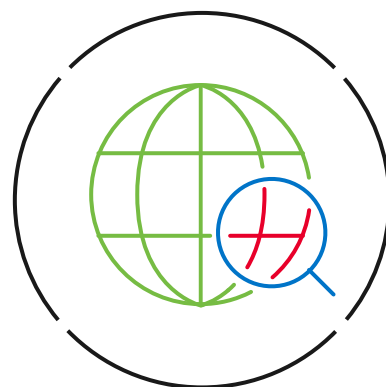
Passport provides ELM functionality and workflows that streamline day-to-day operations in these key areas:

## Matter management

Passport allows corporate attorneys to stay on top of matter portfolios, capturing all matter-related data and streamlining workflows to drive greater efficiencies.

### Key functionality:

- ✓ Matter intake
- ✓ Service of process intake and management
- ✓ Task and deadline management
- ✓ Centralized record of matter narratives, documents, and communications



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## Vendor management

Passport's powerful vendor management and collaboration functionality, including panels, rate negotiations, diversity, and performance ratings, allows corporate legal to enhance firm relationships and ensure alignment on strategy, tasks, and deadlines.

### **Key functionality:**

- ✓ Streamlined collaboration tools
- ✓ Smart, data-based firm assignment
- ✓ Panel management
- ✓ Firm and attorney performance ratings
- ✓ Firm diversity tracking

## Spend management

Passport's automated billing guideline enforcement helps legal departments control spend by flagging noncompliant invoice line items and adjusting prior to review. Reporting and analytics grant full spend visibility for deep insights on financial impacts and opportunities for greater cost savings.

### **Key functionality:**

- ✓ E-billing guidelines enforcement
- ✓ Alternative fee arrangement management
- ✓ Accruals, appeals, and firm rate management
- ✓ Support for global tax and regulatory requirements
- ✓ Budget tracking

## Dashboards, reporting, and analytics

Passport helps corporate legal improve program insights and drive better decisions via a robust reporting and analytics engine. Role-based dashboard visualizations provide visibility into legal operations. Clients can choose from pre-built reports that address the most common report types while providing the flexibility to create custom reports to suit your organization's needs.

## Get flexibility and control with Passport

In addition to key ELM capabilities, Passport offers:

- **Secure on-premise or cloud hosting:** Choose between hosting on-premise or in the Microsoft Azure cloud to align with the security and hosting needs of your organization.
- **Free upgrades:** The Passport Evergreen program offers bi-annual upgrades at no cost to our clients.
- **Extensible platform:** Passport supports custom legal application development on its platform for organizations that need such flexibility.
- **Integration capabilities:** Integrated web services and developer APIs allow for integration with other systems.
- **Access via web or mobile:** Passport is accessible via web browser and mobile devices, so your legal professionals can manage their matters where they choose.

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Passport provides powerful matter, spend, and vendor management capabilities, along with reporting and analytics for transparency across your legal data.

## Features to meet your evolving legal operations needs

Passport is designed to meet client's current needs and evolve with the growth of their legal operations maturity through additional functionality.

- **Predictive Insights:** Use artificial intelligence to create predictive budget and cycle time data for a litigated matter, displayed alongside firm performance data to build a ranked list and assist in intelligent firm assignment.
- **Legal holds:** Automate the assignment, notification, and administration of custodian acknowledgements for legal holds.
- **Document management:** Along with the native Passport document management system, we also have several document management connectors that provide integrations between Passport and Alfresco One, SharePoint Online, eDOCS, or iManage.
- **Third-Party Direct Pay:** Financial clients can track their customers' transaction data with their law firms for full spend transparency and insight into the total value of their law firm relationships.
- **Intelligent Invoice Conversion:** Use AI to pull and convert data from paper invoices into a LEDES file to run through Passport's rules engine. All line-item details are available for adjustment and reporting, offering visibility into 100% of legal spend.

As your legal operations mature, Passport can grow with you, providing key functionality for your business goals.

## Manage your matters in Microsoft Office:

## Supercharged savings, cost controls, and compliance:

### Passport® Office Companion

Helps your corporate legal and claims departments get more done by allowing staff to perform day-to-day matter and spend management activities directly within the Microsoft Office Suite. With single click access to matter creation available directly from Outlook®, Word®, Excel®, or PowerPoint® and a customizable favorites list that ensures quick and easy access to current matters, legal professionals can more easily and efficiently manage their entire matter portfolios directly within the productivity tools they are most comfortable using.

### LegalCollaborator

#### Legal RFPs and competitive bidding

Save money, engage early, and achieve spend predictability efficiently with LegalCollaborator. Use competitive RFPs and reverse auctions to get more value out of your firms while gathering key matter data up front – such as strategy, staffing, and pricing. Use GenAI summarizations and side-by-side comparison dashboards to evaluate firm responses, ensuring the right firm with the best price and fee structure is assigned to every matter.

### LegalVIEW® BillAnalyzer

#### AI-powered legal bill review

Combine AI-powered technology with legal bill review experts to identify and adjust likely billing violations. LegalVIEW BillAnalyzer has been trained on millions of line items to spot trends, hidden patterns, and inconsistencies, enabling legal teams to improve billing guideline compliance up to 20% to save up to 10% on legal spend.

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