

Health checks

An enterprise legal management solution is a vital component of your legal operations. As your organization grows and evolves, it is important to keep the technology aligned with your goals and processes. This alignment ensures that your legal or claims professionals are working efficiently, using data to make better decisions, and you are getting a return on your tech investment.

To that end, Wolters Kluwer ELM Solutions offers a health check service that provides an onsite review of your Passport® or TyMetrix® 360° solution. We will assess your current state and identify opportunities to improve processes, take advantage of under-utilized functionality, and reengage your legal professionals.

Key benefits of the health check

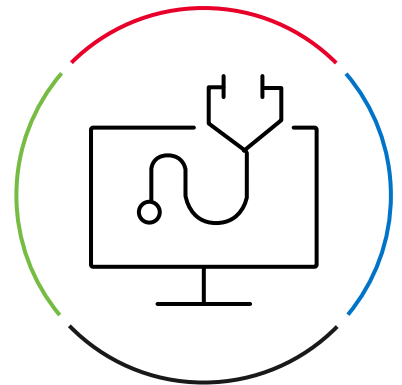
An ELM Solutions health check is an opportunity for your organization to identify areas of system and process improvement and provides the following benefits:

- ✓ **Optimize existing functions** – We will identify key gaps in the usage of your current system and how it might support your processes and business.
- ✓ **Employ proven best practices** – We will leverage our experience and expertise to assess possible changes and provide knowledge transfer to close key knowledge gaps for your legal operations team and suggest process changes.
- ✓ **Drive future planning** – We will provide clear recommendations that support your desired and intended future use of your solution and overall business objectives to drive legal team value.
- ✓ **Uncover additional solutions** – We will explore new solutions to help you achieve your current and future goals.

The process

ELM Solutions consultants will work with your subject matter experts to understand your organization and processes, usability requirements, reporting challenges, and solution challenges to gauge how effectively your organization is using Passport or TyMetrix 360° to achieve your business objectives.

As we work with you, our PSG consultants will identify areas of process, system, and adoption improvements, which will be included in an outcomes report. The report summarizes our findings, as well as changes made to your system, training provided while onsite, and our recommendations. These recommendations address additional solution changes, reporting needs, and training refreshes in alignment with your current and future business goals.



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The three main areas we examine in the health check are:

✓ Business process review

ELM Solutions meets with your legal operations team and subject matter experts to determine how the product fits into their day-to-day activities and what functionality is being utilized. We examine four areas of possible improvement:

- **Legal department organization structure review:** We analyze the current structure of your legal or claims department, evaluate overall usage of the system, and determine possible required changes to be made, documenting the system and business impacts of those changes.
- **Matter lifecycle review:** Our consultants review data and process requirements for two practice area/matter type scenarios from intake to closure, including fields to be entered, firm/vendor assignment requirements, case notes and financials (risks, outcomes, budgets, etc.), email and document management, and closure activities and expectations. We'll assess roles and responsibilities as part of the review (who is doing what, when, and how) and suggest changes to processes or the solution to optimize usage and increase user adoption.
- **Law firm collaboration:** ELM Solutions reviews your law firm engagement process and considers future changes that might be required to reach your firm and legal vendor collaboration goals. A review of your current law firm onboarding and engagement process includes timekeepers, budgets, matters, documents, and accruals.
- **Invoice lifecycle review:** We review your existing outside counsel billing guidelines and match them against your spend rules and invoice validations to determine if they're optimally aligned. We'll identify invoice submission anomalies and opportunities to improve the rejection of submitted invoices if they are out of compliance.

✓ Reporting

ELM Solutions will work with your business/reporting resources to confirm your current and future reporting needs. We'll identify high-level gaps both within the reporting tool and onscreen views (e.g., list pages and dashboards), assess report optimization requirements, and capture high-level specifications for desired reports and report packs.

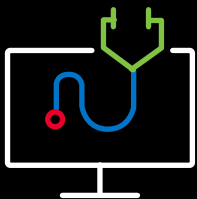
✓ Training and adoption

ELM Solutions will review your current solution usage gaps and pain points for users, legal or claims operations, and system admins. As part of the onsite engagement, we will provide knowledge transfer as applicable and recommend additional training designed to close key knowledge gaps for the broader audience.



Additional health check services

- In addition to the standard health check package, we also offer à la carte health check services:
- Additional practice area and matter type reviews
- Expanded interviews to address users' system usage, processes, and pain points
- An examination of your current governance and maintenance model
- An expanded review of your billing guidelines with recommendations based on industry best practices
- A review of system and database performance, identifying maintenance opportunities
- Verification of resource allocations (CPU, memory, etc.), patches, user security caching, and indexing
- A review of process and job schedules and data impacts on performance
- User adoption plans to reengage your full community (users, legal ops, and system admins)



For more information about health checks for Passport® or TyMetrix® 360°, contact your account manager or customer success manager.

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