INTRODUCTION TO SHARE DO.

ShareDo™

... Subject to contract

AGENDA

1. Introductions
2. What is Sharedo?
3. Who do we work with?
4. Demo
5. Next Steps

ShareDo

WHAT IS *SHARE DO?*

Sharedo is the best-in-class adaptive case and matter management platform for enterprise legal firms

A ‘low-code’ platform that combines case & matter management, business insights and artificial intelligence

ShareDo™

What is ShareDo?

HOW DO WE HELP *YOUR BUSINESS?*

Standardise work; "Do more with less" and increase Performance

Reduce Unit Cost of Matters to become more Profitability

Harness data to Predict and respond to change

=

Gain competitive advantage

Many +1s = Large Gains

ShareDo™

What is ShareDo?

HOW DO WE HELP *YOUR LAWYERS?*

We make light work of your daily tasks, so you can focus on maximising your “lawyering”.

Sharedo adapts and caters for your individual work styles so you remain highly focused and productive.

Sharedo helps Inform better judgement and reduces “context switching” through actionable insights

=

Do more, worry less

We provide a digital assistant for your lawyers.

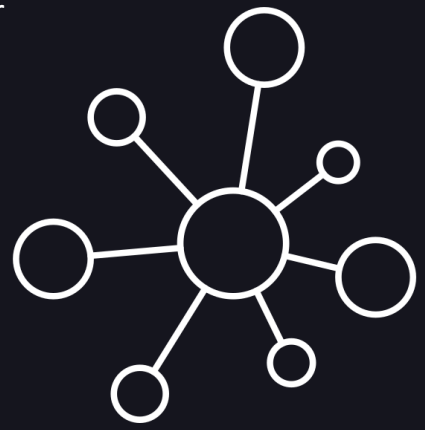
ShareDo™

What is ShareDo?

BE MORE PRODUCTIVE, *WHATEVER* YOUR STYLE

Shared service centres & support teams

Matter Management or Case Management



- Litigation & Disputes
- Real Estate
- Commercial
- Employment
- Private Client

Light touch -> no touch

Paperless and digital postrooms

We personalize the experience for different practice group and clients work style.

ShareDo™

What is ShareDo?

SUPPORTING *CONTINOUS PROCESS IMPROVEMENT*

ShareDo™

OUR *CLIENTS*

Global 500 / UK Top 70 / Fast Growing

Long Term Partnerships

Shared Mutual Success

=

100% Client Retention

ShareDo™

What is ShareDo?

DIGITAL ASSISTANT *FOR ALL LEGAL PRACTIONERS AND ALL WORK TYPES*

We make light work of your daily tasks, so you can focus on maximising your “lawyering”.

Sharedo adapts and caters for your individual work styles so you remain highly focused and productive.

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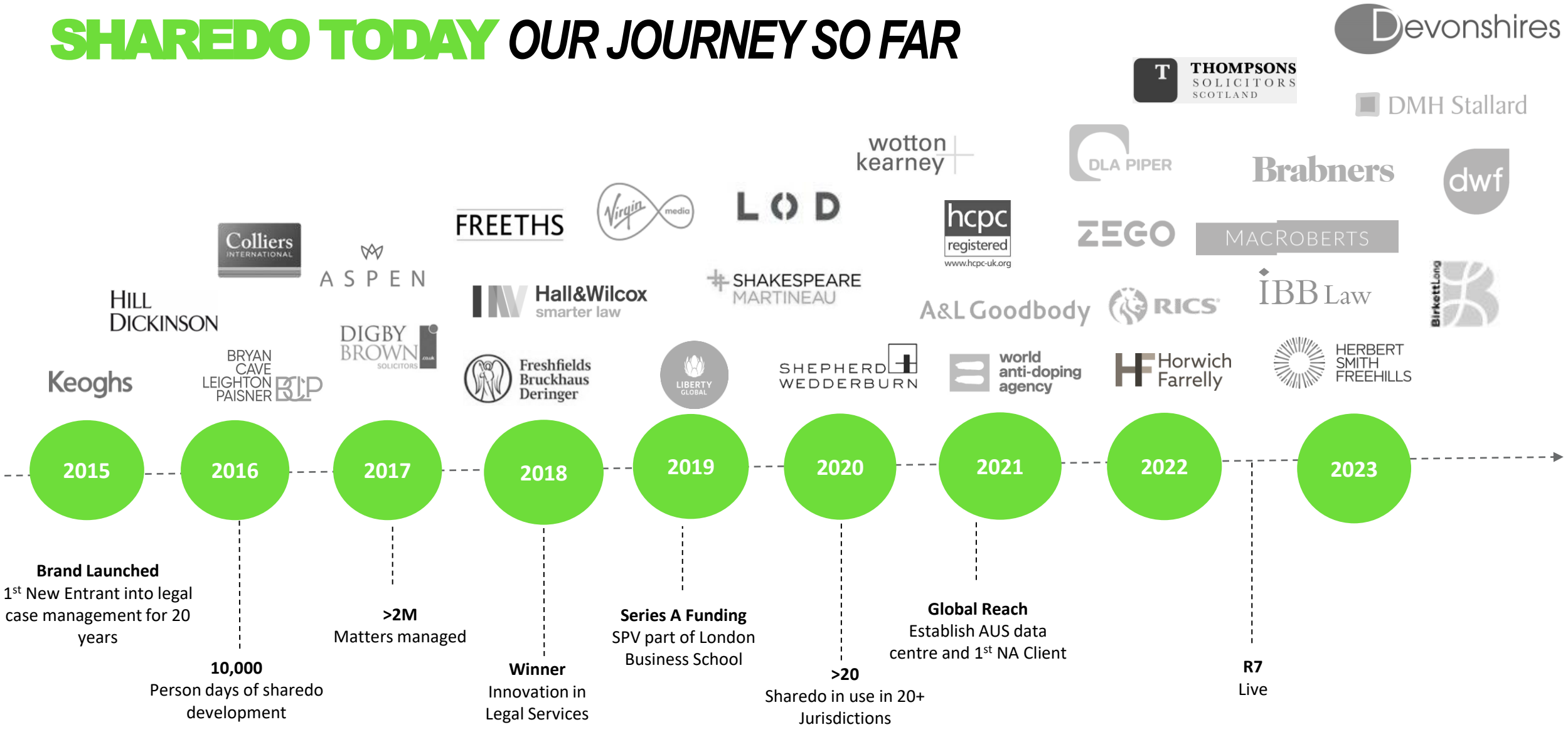
SHAREDO TODAY *OUR JOURNEY SO FAR*



Enterprise Focused + Long Term Partnerships = Mutual Success

SHAREDO TODAY *SUPPORTING THE WORLDS MOST AMBITIOUS LAW FIRMS TO WORK SMARTER*

Growth
>50%
YOY

In use in
22
Jurisdictions, 3 global data centres

50K
Users

> 150
person Years R&D

Solution accelerators for
8
Practice groups out of the box

50M
Matters completed

Sharedo focused on the needs of the Global Top 500 firms.

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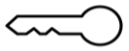
OUR PLATFORM *SOLUTION ACCELERATORS*

1 Growing Library of solution packs for Practice Areas

Client Matter Inception

Disputes


Real Estate

Commercial

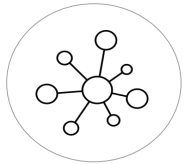
Employment

Private Client

2 Support the Analysis Process and Definition Phase

- BUSINESS CASE CALCULATORS
- SOLUTION ESTIMATORS
- HIGH LEVEL DESIGNS
- PROCESS MODELS
- DELIVERABLE TEMPLATES

3 Pre-Configure Best Practice Solutions


Work Types

Workflows & Integrations

Personas & Portals

Management Information

ShareDo™

ACCELERATOR PACKS

Legal (B2C)

Client Matter Inception

Disputes

- Personal Injury
- Employment
- Works Comp (AU)

Resi Real Estate

- Acquisition
- Disposal

Family

- Acquisition
- Disposal

Private Client

- Acquisition
- Disposal

Legal (B2B)

Client Matter Inception

Disputes

- Claimant / Recoveries
- Remediation
- Defendant
- Employment
- Debt Recovery
- Costs
- Workers Comp (AU)

Real Estate

- Acquisition
- Disposal
- Plot Sales
- RE AU

Corporate

- Contract Drafting
- Case Light Work Types

Common

Proceedings

- E&W Party 7 Part 8
- Scottish Ordinary/ Summary
- Australian Court Procedure

Offers

Compliance

- E&W Party 7
- Scottish Ordinary/ Summary

Service Desk

Insurance

FNOL

Claims Handling

- Motor
- Household

Fraud

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DEMO END USER

ORIENTATION

- WORKBENCH
- KEY CONCEPTS
  - PERSONAS
  - WORK TYPES

MATTER INCEPTION

- ON-BOARDING
- COMPLIANCE
- BULK UPLOAD

MATTER OVERVIEW

- PHASES
- MATTER DASHBOARD
- FINANCE
- COLLABORATION

PRACTICE GROUP WORKFLOWS

- ASSISTIVE
- ~~PRESCRIPTIVE~~
- ~~STRAIGHT THROUGH PROCESSING~~

REPORTING

- VIEWS
- DASHBOARDS

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DEMO EMAIL MANAGEMENT

KEY CONCEPTS

- MONITORED EMAIL ADDRESSES
- ALLOCATION RULES
- TEAM OR PERSONAL EMAIL ADDRESSES

SEND EMAIL FROM SHAREDO

- FULL TEMPLATE SUPPORT
- PERSONAL OR TEAM EMAIL ADDRESSES
- OFTEN INITIATED AS PART OF A WORKFLOW

SEND EMAIL FROM OUTLOOK

- CC IN MONITORED EMAIL ADDRESS OR FILE IT
- REQUIRES A MATTER REFERENCE

RECEIVE RESPONSES

- TEAM, PERSONAL OR MATTER INBOXES
- AUTO OR MANUAL FILING
- MANAGING RESPONSES & SLAS

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DEMO DEFENDANT DISPUTES

ORIENTATION

- WORKBENCH
- KEY CONCEPTS
  - PERSONAS
  - WORK TYPES

MATTER INCEPTION

- INSTRUCTION
- COMPLIANCE
- BULK UPLOAD

MATTER OVERVIEW

- ELIGABILITY
- QUANTUM
- LIABILITY
- OFFERS
- COLLABORATION
- TK: ROI

OPERATIONS

- DASHBOARDS
- MODELLER
- PRECEDENTS
- ADMIN

Receipt → Eligibility → RFI → Quantum → Offers → Comms

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DEMO COMMERCIAL REAL ESTATE

ORIENTATION

- WORKBENCH
- KEY CONCEPTS
  - PERSONAS
  - WORK TYPES

MATTER INCEPTION

- INSTRUCTION
- COMPLIANCE

MATTER OVERVIEW

- WORK FLOW STYLES
- DATA CAPTURE
- KEY DATES
- PRECEDENTS

OPERATIONS

- DASHBOARDS
- MODELLER
- PRECEDENTS
- ADMIN

***Automated**

Draft & Negotiation → Report & Engross → Pre-Completion → Completion → Post Completion → Closing

ShareDo™

DEMO ADHOC

1. Allocation of tasks - team based
2. Machine Learning -
3. Data scraping
4. Approval / Supervision
5. Undertakings
6. Risk Assessment
7. Incoming Post
8. Reporting

What is Sharedo?

THE *PLATFORM*

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OUR PLATFORM *STRATEGY*

OMNI CHANNEL DIGITAL DESKTOP

LOW CODE

- Case Types
- Forms
- Workflow
- Business Intelligence

+

LEGAL DOMAIN FEATURES

- Integrations
- CMI / Matters / Proceedings

+

SOLUTION ACCELERATORS

- Accelerators for each practice group

OPEN AND EXTENSIBLE

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OUR PLATFORM *WHAT'S IN THE BOX?*

Omni channel digital desktop

UNRIVALLED USER EXPERIENCE

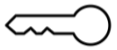
API | POST | EMAIL | PORTALS | SMS | MOBILE

Fundamental shift
In approaching
Work management

Configurable for all practice groups

CMI & Matter Mgmt

Litigation


Real Estate

Commercial

Employment

… and more

Solution Accelerators for individual practice areas

Legal entities, integrations & processes

CMI
- CMI
- Quotes
- Conflict
- AML

RESOURCE
- Time recording
- Cost to serve
- Availability
- Competency

FINANCE
- Disbursement
- Budgets
- Invoices
- Fees

CLIENTS
- Portals
- Key SLAs
- Pricing

INTEGRATIONS
- iManage/ O365
- InTapp
- Elite/ Aderant
- Land Registry
- MOJ etc

Rapidly configure your case types

Low code platform for managing work

EXTENSIBILITY
- Forms
- Workflows
- Reports

MODELLER
- Personas
- Work Types
- KPIs
- Allocation Rules
- Approvals
- SLAs
- Lists
- Parties
- Resourcing

DOCUMENTS
- Assembly
- Paperless
- Bundling
- eSignature

Extend the platform to meet your unique needs

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OUR PLATFORM *KEY CONCEPTS*

WORK TYPES

- **Define key work types** and their specialisms
- **Build a Data Dictionary** through the work lifecycle
- **Inherit and compose your work types** from base types and features

CASE PLANS

- **Optimize Workflow** through process management and resource optimization
- **Automated** process steps through intelligent automation and allocation

PERSONAS

- **Define Participants** that are involved throughout the work processing and their involvement
- **Configure** secure portal access
- **Reduce data entry** through self service forms

MANAGEMENT INFORMATION

- **Pro-actively monitor** your work pipeline
- **Understand** resource bottlenecks
- **Define reporting models** for self service ad-hoc reporting

DATA MIGRATION

- **Data and document** loading framework

DOCUMENT TEMPLATES

- **Manage 1000's of precedents**

INTEGRATIONS

- **Out of the box** and extendable event model

CHANGE MGMT

- **Build tacit and implicit knowledge**

OUR PLATFORM *ROADMAP*

ShareDo

R8, R9, R10
PRODUCT
ROADMAP

FOR CLIENTS

Date 28/11/2021

Prepared by: Ben Nicholson

ABOUT SHAREDO

sharedo, created by slicedbread, is an adaptive case management platform. Built using the best technology stack to solve today's business problems; sharedo improves a law firms' productivity and efficiency to help drive successful client outcomes.

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7th
Major Release

Built in
Collaboration
With our clients

Strategic Themes for R8 (2023)

- New Outlook Plugin
- New Forms Designer
- Bundling – best in class
- List view Enhancements

ShareDo

DEMO MODELLER

PERSONAS AND PORTALS

- PERSONAS
- PORTALS
- MENUS
- PORTAL EXTENSIBILITY

WORK TYPES

- HIERARCHY
- DATA COMPOSER
  - KEY DATES
  - PARTICIPANTS
  - FORMS
- PHASES & GUARDS
- LIST VIEWS

WORKFLOWs

- END USER VIEW
- APIS
- EVENTS
- DESIGN CANVASSES
- ALLOCATION RULES
- NOTIFICATIONS
- WORKFLOW EXTENSIBILITY

DOCUMENT ASSEMBLY

- TEMPLATE TYPES
- WORD PLUGIN
- CONTENT BLOCKS
- DELIVERY CHANNELS
- VERSION CONTROL

FINANCE

- CHART OF ACCOUNTS
- BUDGETS
- TRANSACTIONS

MANAGEMENT INFORMATION

- DATA WAREHOUSE
- POWER BI

SOLUTION PACKAGING

- IMPORT/EXPORT
- PACKAGES

SECURITY

- IDENTITY FLOWS
- GLOBAL AND WORK TYPE PERMISSIONS

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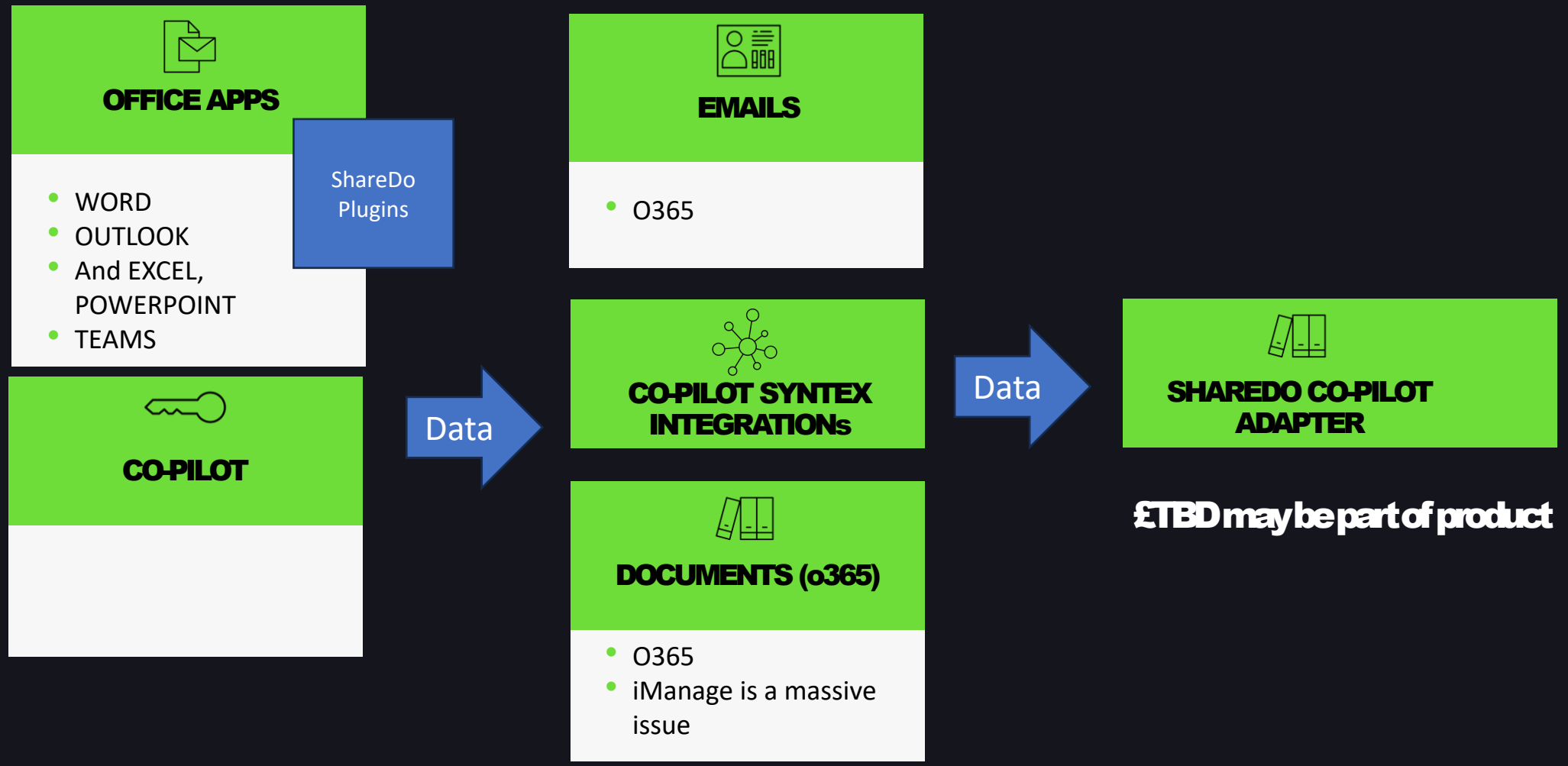
INTEGRATION CO-PILOT



£30 PUPM

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Section Five

OUR TECHNOLOGY

A brief overview of the technical stack of sharedo

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OUR TECHNOLOGY *APPLICATION ARCHITECTURE HIGHLIGHTS*

Sharedo public app tier

- **Sharedo UI**
  The main application UI
- **Sharedo API(s)**
  The HTTP APIs for the application
- **Sharedo identity**
  OAuth/OIDC Identity and authentication services

Sharedo client "apps"

- **Word Plugin**
  Document template authoring
- **Mobile**
  Apps (and open source framework)

Sharedo orchestration tier

- **Sharedo EE/CFG**
  The event engine configuration services
- **Sharedo EE**
  The event engine – asynchronous orchestration

Sharedo private app tier

- **Sharedo indexer**
  Read store sync / orchestrator
- **Sharedo microservices**
  Other microservice decompositions…

Application dependencies

- **Event store**
  HA, persistent, append only event store
- **SQL Server**
  Plus SSIS and SSRS
- **Exchange/O365**
  On-premise or office 365
- **Elastic search**
  Dedicated search/lists – also used for logs
- **DMS**
  SharePoint, O365, iManage, CE, etc…
- **Accusoft**
  Document Preview, Conversion, Redaction

Optional dependencies

- **Doc assembly**
  Hotdocs, contract express
- **SEQ**
  Structured logging and alerting
- **Power BI**
  Preferred reporting and discovery
- **Key Services**
  Address lookup, sms, companies house
- **Integrations**
  Integrate to/from anything

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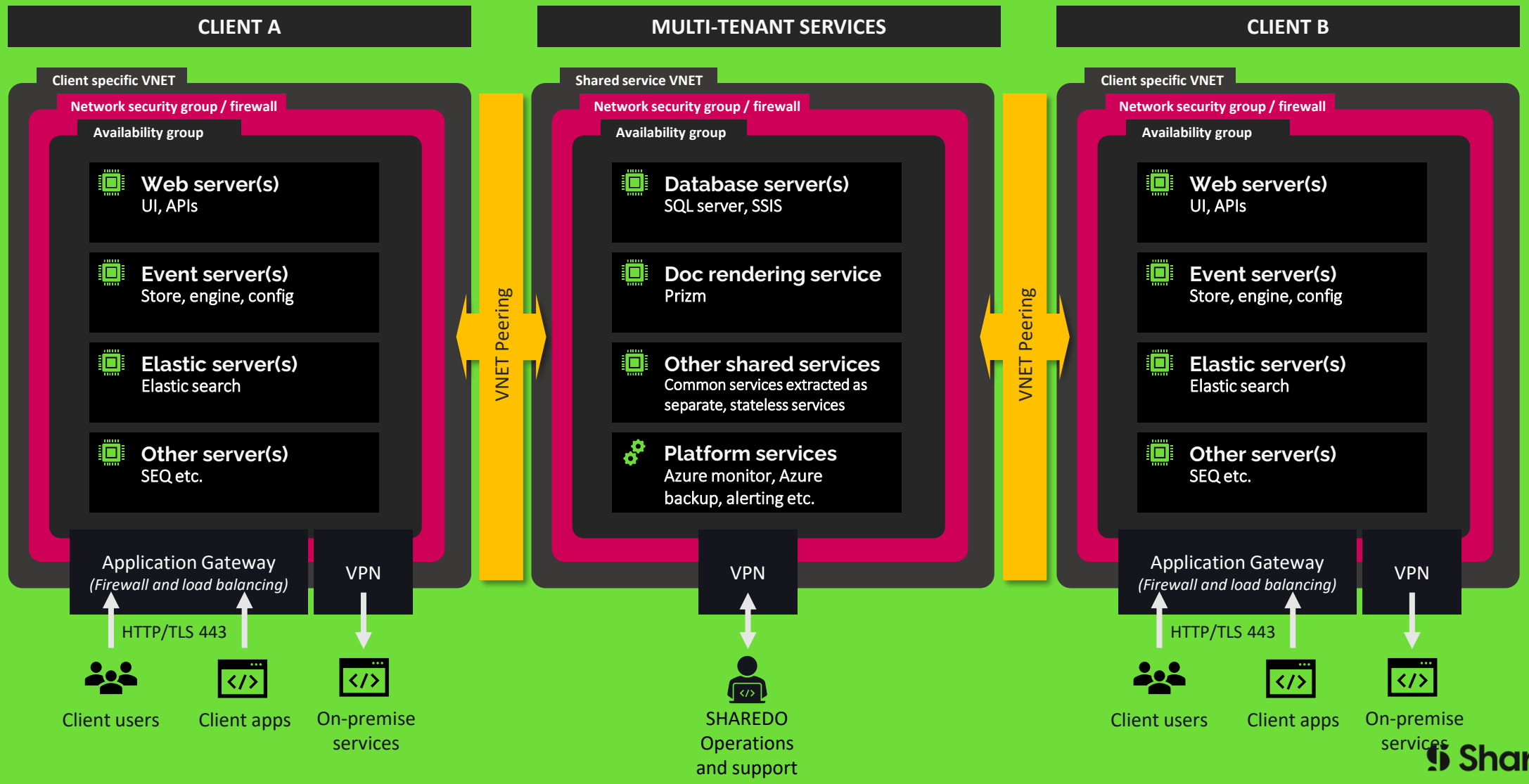
OUR TECHNOLOGY *TECHNICAL ARCHITECTURE HIGHLIGHTS*



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SECURITY PLATFORM LEVEL SECURITY

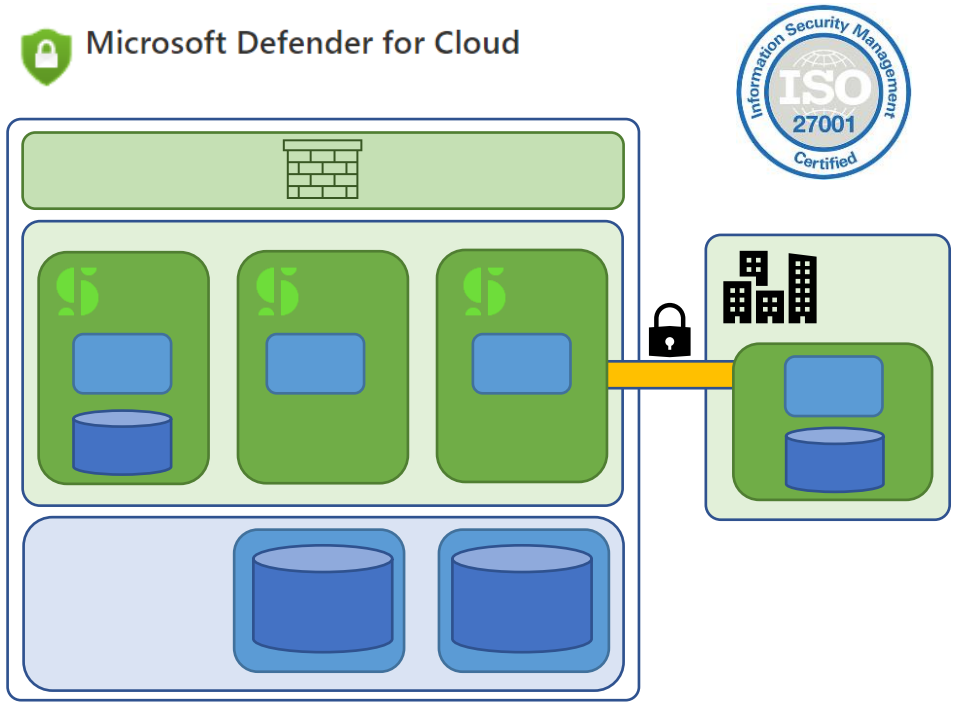
Platform Security

Continually Monitored
Microsoft Defender for Cloud continually monitors the entire platform and advises on vulnerabilities and threats

Secure Application Gateway
Secure SSL access through Azure Application Gateway and Web Application Firewall.

Integrated with your Security
Fully integrated with your organisations login and MFA policies .

Integrated with your Systems
Use your own applications and security policies for Document Management, Finance and Compliance



Information Security Management ISO 27001 Certified

Data Security

Data Encryption
Platform managed or BYOK

Data Anonymisation
Assess performance at production volume

Data Segregation
Full customer data segregation

Data Sovereignty
Choice of global locations for data storage

Security Walls
Restrict visibility of data within your teams

People and Process

Independently Tested
Annual penetration testing via a dedicated independent supplier

Continually Improved Security
Build and Release managed utilises OWASP recommended code vulnerability scanning software.

Audited Support
Support access through audited CAB process providing JIT access using SSO and MFA

Direct Management
Platform management fully in-house using permanent UK staff

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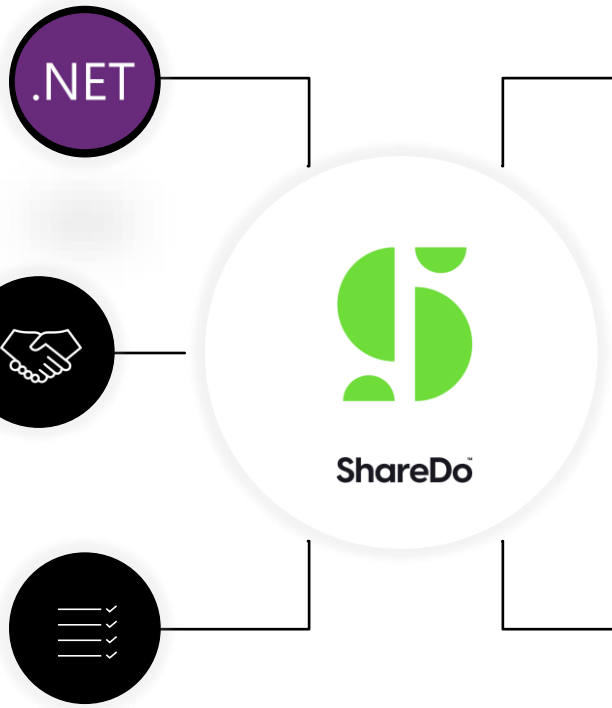
OUR TECHNOLOGY SOFTWARE ARCHITECTURE HIGHLIGHTS



Back end – ubiquitous stack

Everything from API is standard .Net (C#), from the APIs, the services, the data access, projection framework, event sourcing, all code is C#.

Front end – ubiquitous stack

Lightweight vanilla HTML5/CSS3 and JavaScript "skin" over the back-end APIs. Custom UX framework build around common low-level libraries such as KnockOutJS rather than frameworks.

API first principles

Entire platform exposed as HTTP/REST APIs.

Decomposition principles

Where it makes sense to do so – de-compose monoliths, identify bounded context, extract re-usable or multi-tenant services accordingly. Decompose code for simplicity and reusability – build complexity by composition.

Principles of engineering

Employ principle of least privilege / secure by default, clean code practices, effective OOP design, SOLID principles of engineering.

Integration abstraction principles

Depend on abstractions over 3rd party components where possible.

ShareDo leverages **ubiquitous** technology and **standard** software engineering practices

ShareDo

SECURITY APPLICATION LEVEL SECURITY – KEY CONCEPTS

Global Security

Authentication Provider

- Support for multiple providers with the same instance
- Oauth / AD / Forms

Personas

- Define the theme/ branding a user sees
- And layout and content of their portals

User Type

Permission Sets

- Define the set of global permissions that a user has.
- There are ~ 300 global permissions

Work Item Security

Work Item Permissions

- Access to every work item is controlled
- Lock down both access to the work item but also specific functionality
- Can vary permission by Phase

Security Barriers

- Create Rules to prevent accidental assignment of permissions to work items

Participant Role

Permission Hierarchical

- Define Permission Hierarchies and have them inherit through your matters and tasks

Subject Security

ODS Walls

- Create Ethical Barriers to prevent access to PID
- Assign walls automatically based on rules

Subject Access Requests

- Use 360 degree views to export related information

People, Organisations

Right to be forgotten

- Anonymise PID

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Section Five

INTEGRATION

- *LANDSCAPE*
- *TOOLSET*

A brief overview of how Sharedo Integrates with external applications

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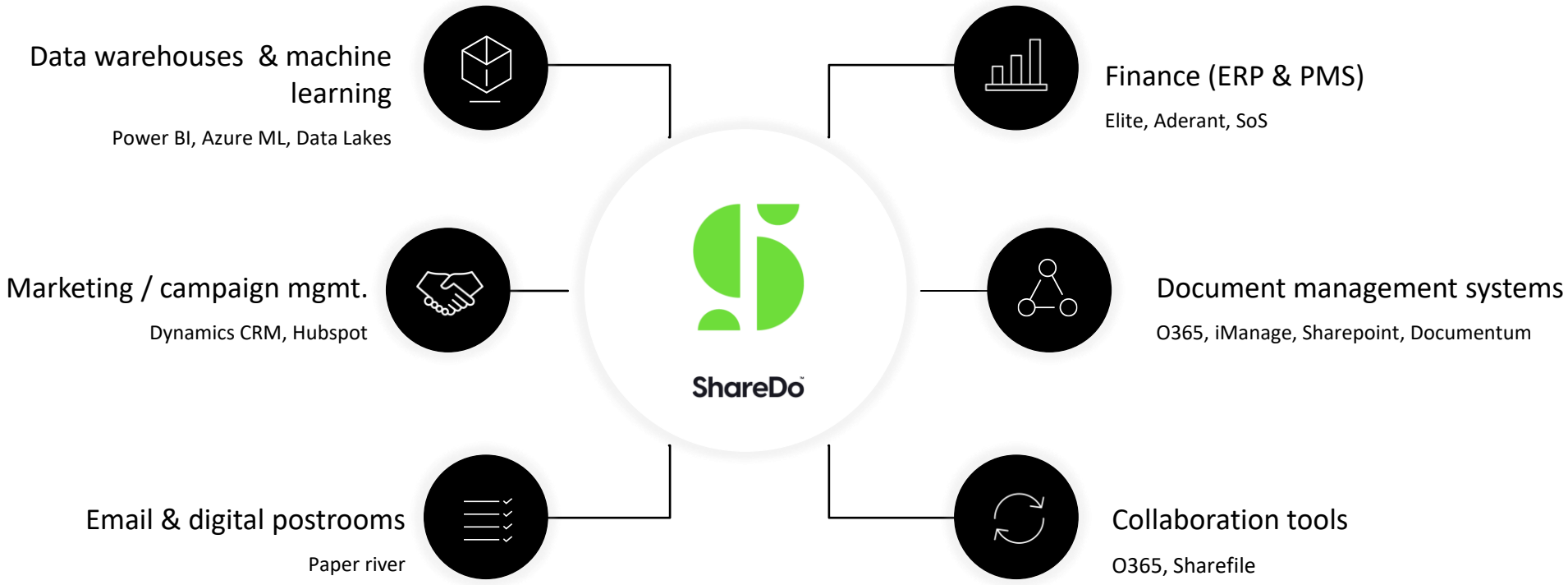
OUR PLATFORM *INTEGRATION LANDSCAPE*



ShareDo **plugs** seamlessly into your existing

Microsoft Office Suite

Document Management

Legal Applications

*its designed API First as well!

ShareDo

INTEGRATION *DIGITAL MARKETING*

DIGITAL MARKETING

Hub Spot

- Manage your Digital Marketing spend with best in class tools such as Hub Spot
- Track the success conversion from Digital Channels to Landing Pages

LANDING PAGE

- Highly Optimised for conversion and easy data collection
- Typically custom build with “hooks” to ShareDo API
- Integrate Marketing tracking ids

ENQUIRY PROCESS

- Optimised for case conversion
- Track Progress through Phases
- Manage nurture processes
- Add Marketing Tracking IDs
- Associate Lead Values

Single view of marketing effectiveness across the sales pipeline + optimisation of “drop offs”

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A TYPICAL LEGAL *ENTERPRISE ARCHITECTURE*

	SALES	SERVICE	FINANCE
Key Drivers	Future revenue	Profitability	Cash

The majority of Industries follow a standard pattern for Enterprise Architecture like the one above.

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INTEGRATION *CRM*

CRM e.g. HubSpot

- Marketing Automation
- Contact Data Enrichment
- Contact Data Scraping e.g. Sales Navigator
- Event Management
- SEO & PPC Optimisation

- Sales Funnel Mgmt
- Relationship Mgmt

CMS e.g. ShareDo

- Case Management
- Work Management
- Party Management

Contacts / Parties / Relationships / Custom Entities

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WORK SMARTER *DEBT SOLUTION ACCELERATOR*

WORK TYPES

- B2C and B2B Debt Recovery + Defendant + Advice
- Litigation – England & Wales, Scotland
- Enforcements
- Debt Tranches
- Payment Plans
- Payments
- Purchase Orders

WORKFLOWS

- Investigation (STP)
  - Searches
- Pre-Action (STP)
  - Contact Slots
- Service
  - MCOL Integration
- Litigation
  - Enforcements

PERSONAS

- B2C Debtor Portal
  - View Matter Details
  - Exchange Documents
  - Make Payment
  - Complete Income & Expenditure
  - Complete PAP
- B2B Client Portal
  - View Progress
  - Manage Approvals / Authority

MANAGEMENT INFORMATION

- Pro-actively monitor your work pipeline
- Understand resource bottlenecks
- Understand Settlement Rates
- Monitor Contact Strategy Effectiveness

OUR PLATFORM *INTEGRATION TOOLSET*

INBOUND

- Public APIs
- Data Migration Framework
- Excel Imports

OUTBOUND

- Feature Integrations
- Workflow Actions

- Smart plans*
- Portal & widget definitions

DEVELOPER

- Plugins
- Pipeline actions
- aspects

INTEGRATION ARCHITECTURE - MODEL

Consume anything

Integration triggers

Event
Async
Any domain event raised by sharedo

Smart plan
Async
Call integrations within a smart plan

Code Hooks
Implement any IXXXContributor

Custom code
Custom UI, Custom APIs

EE receiver
Out of band
Custom receiver / web hooks

Call the service
Any protocol as required

External service / app / integration

Be consumed

OAuth 2.0/OIDC

HTTP/TLS 443
(1) Get a token

HTTP/TLS 443
(2) Call APIs

Sharedo estate

Sharedo identity
Identity and authentication services

Sharedo API(s)
The HTTP APIs for the application

All OAuth 2.0 grants and flows supported, including;

Implicit
- Sign on, identity only, no refresh token
- Execute APIs with user context
- e.g. Web based SPA

Hybrid and Auth code flow
- Sign on, identity and refresh tokens
- Execute APIs with user context
- e.g. Native app

Client credentials
- Sign on with client identity and secret
- Execute APIs without user context
- e.g. App to app integrations, background jobs etc
- Grant extensions:
  - Impersonate fixed
  - Impersonate any

slicedbread

sharedo

Section Three

NEXT STEPS

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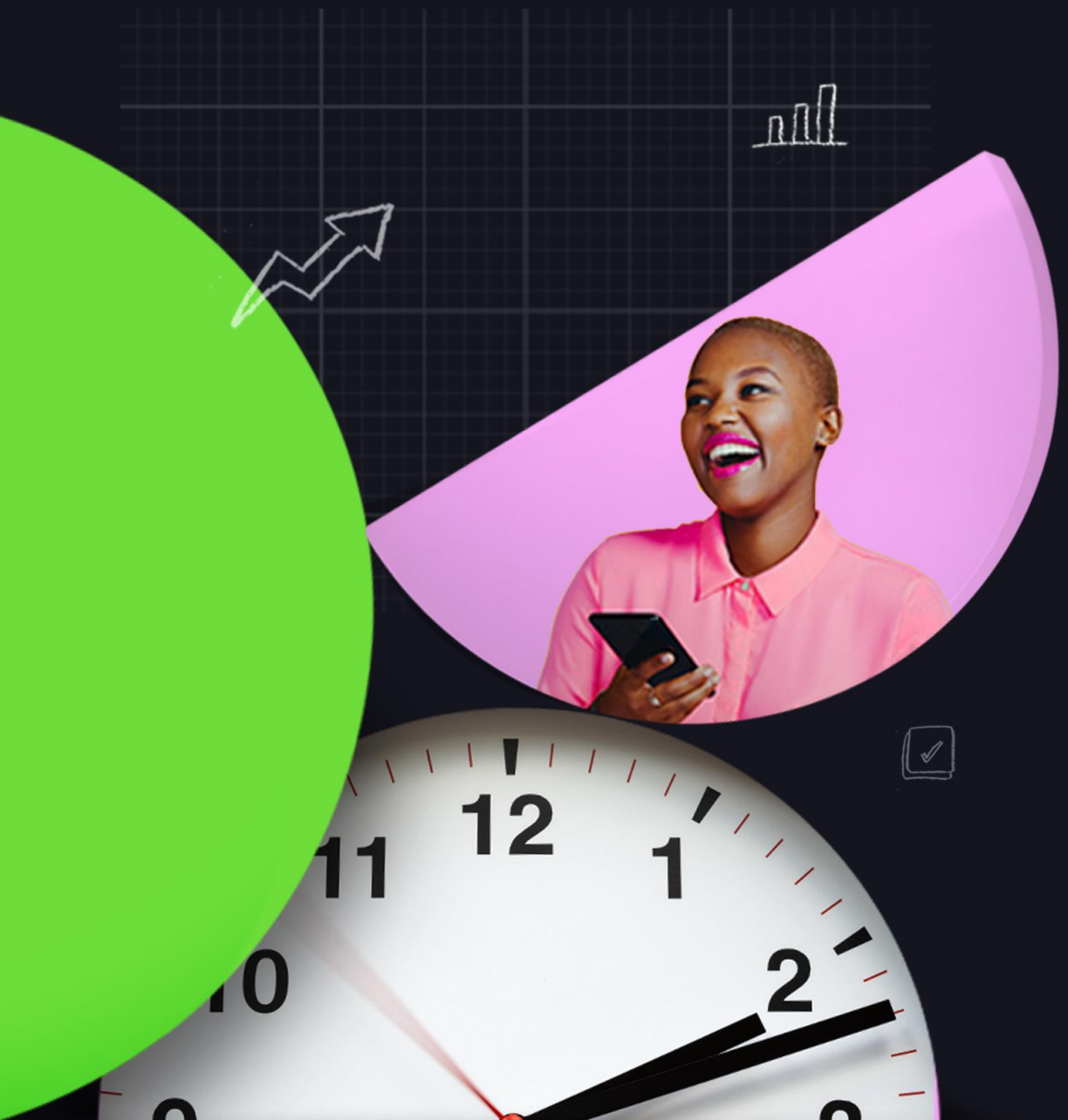

Section Four

YOUR REQUIREMENTS

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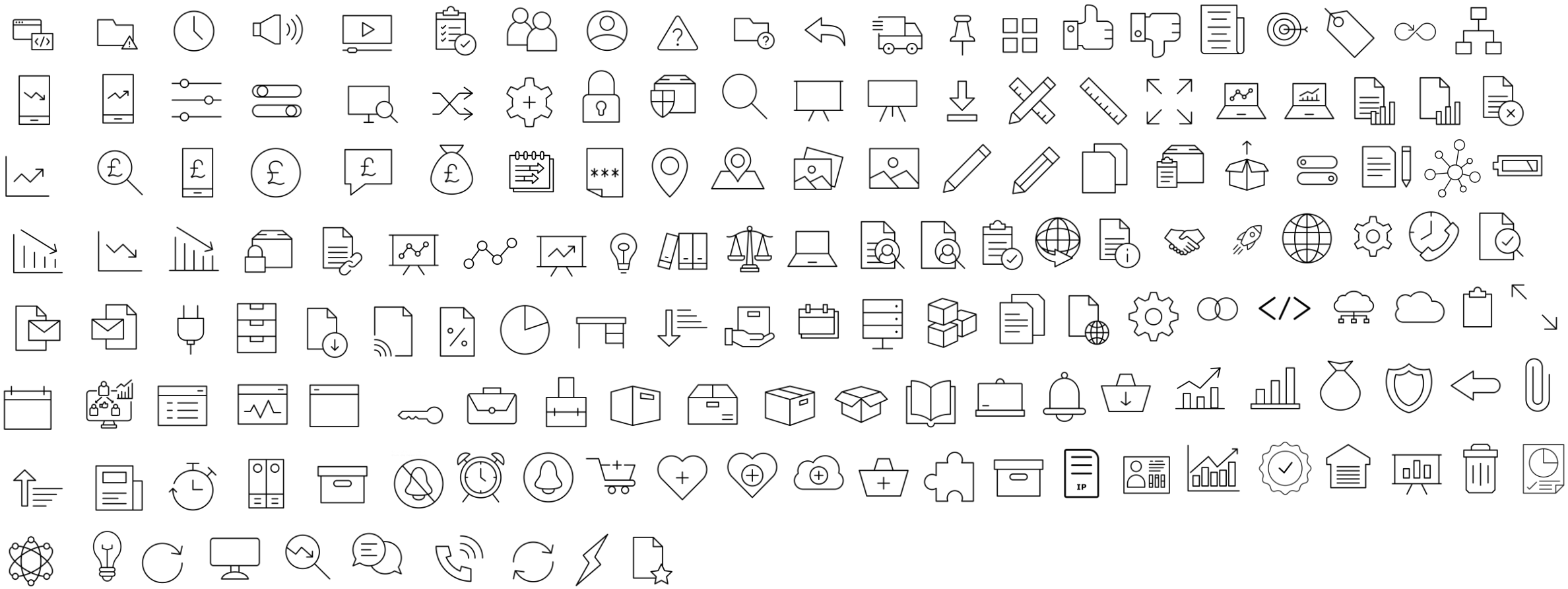
ICONOGRAPHY

Please email XXXXX if you need additional icons.



Section Five

OUR *JOURNEY*

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A TYPICAL LEGAL *ENTERPRISE ARCHITECTURE*

	SALES	SERVICE	FINANCE
Key Drivers	Future revenue	Profitability	Cash

The majority of Industries follow a standard pattern for Enterprise Architecture like the one above.

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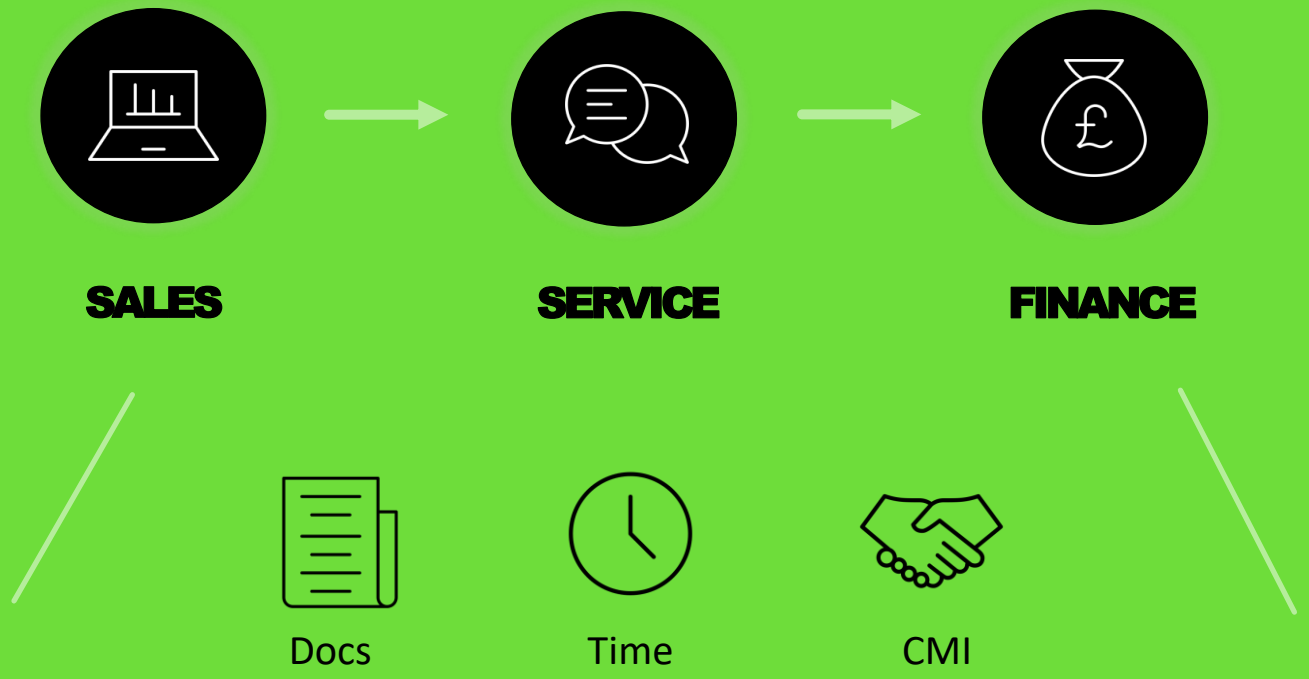
IN LEGAL THE "SERVICE SPACE" *WASN'T BEING ADDRESSED*



... but no-one was truly addressing firms need to improve their end to end service.

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WHY? A WEAK BUSINESS CASE FOR SERVICE

SALES **SERVICE** **FINANCE**

Existing solutions only target ROI here

Doc Auto Fees CMI

Employment Family Private Client Disputes Corporates IP Property ...and more

But value lies here

... Sharedo targets ROI across all practice areas

ShareDo

SHAREDO TODAY *SUPPORTING LAW FIRMS TO WORK SMARTER*

ShareDo is the best-in-class adaptive case and matter management platform for enterprise legal firms

A ‘low-code’ platform that combines case & matter management, business insights and artificial intelligence

Reduce cost to serve + Become data driven + Adapt to change + Leverage existing investment = Gain competitive advantage

In use in **22 countries**

3 Global data centers

100K users

20M+ Cases managed

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Section Seven

IMPLEMENTING
SHARE DO

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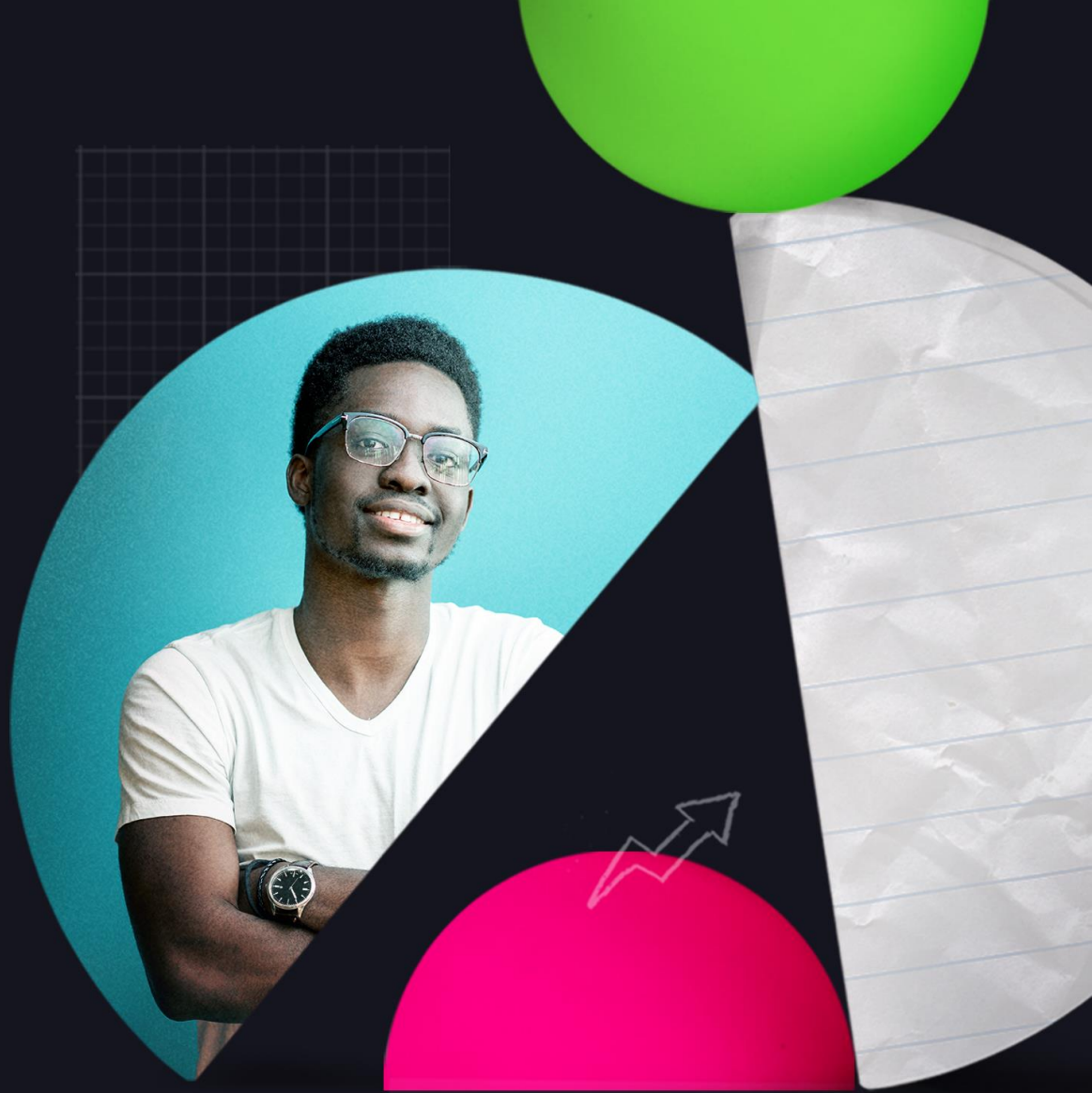

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IMPLEMENTING SHAREDO APPROACH

Solution Scope

Solution Accelerators

MVP Features & Integrations

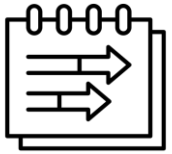
Personas

Document Templates

Implementation

Training

- Public Courses
- Private Courses
- Implementation Mentoring



Project Implementation

- You choose the level of Implementation Services Required
  - Outsourced
  - Combined
  - Mentored

Run and enhance

Run and Operate

- Pro-active Monitoring and Upgrades
- On-going support to suit your needs
  - Minor Change call-off pots
  - Managed Service

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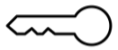
OUR PLATFORM *SOLUTION ACCELERATORS*

1 Growing Library of solution packs for Practice Areas

Client Matter Inception

Litigation


Real Estate

Commercial

Employment

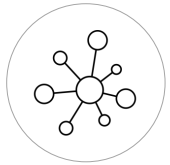
Family

Private Client

2 Support the Analysis Process and Definition Phase

- BUSINESS CASE CALCULATORS
- SOLUTION ESTIMATORS
- HIGH LEVEL DESIGNS
- PROCESS MODELS
- DELIVERABLE TEMPLATES

3 Pre-Configure Best Practice Solutions


Work Types

Workflows & Integrations

Personas & Portals

Management Information

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WORK SMARTER *DEBT SOLUTION ACCELERATOR*

WORK TYPES

- B2C and B2B Debt Recovery + Defendant + Advice
- Litigation – England & Wales, Scotland
- Enforcements
- Debt Tranches
- Payment Plans
- Payments
- Purchase Orders

WORKFLOWS

- Investigation (STP)
  - Searches
- Pre-Action (STP)
  - Contact Slots
- Service
  - MCOL Integration
- Litigation
  - Enforcements

PERSONAS

- B2C Debtor Portal
  - View Matter Details
  - Exchange Documents
  - Make Payment
  - Complete Income & Expenditure
  - Complete PAP
- B2B Client Portal
  - View Progress
  - Manage Approvals / Authority

MANAGEMENT INFORMATION

- Pro-actively monitor your work pipeline
- Understand resource bottlenecks
- Understand Settlement Rates
- Monitor Contact Strategy Effectiveness

WORK SMARTER *DEFENDANT DISPUTES*

WORK TYPES

- CMI (Instruction/Enquiry)
- Dispute Resolution, Breach of Contract, Data Protection, Employment, General, Personal Injury, Professional Negligence, Property, Commercial & Contracts, Real Estate, FDR, Mass Claims, Collective Action
- Litigation – [Multi Jurisdiction]
- Negotiation: Offers
- Tasks & Activities
- Financials (Reserves, Cost Budgeting)
- Assessments

WORKFLOWS

- Inception
  - Intake
- Investigation (STP)
  - Searches
  - Triage/Eligibility
  - Quantum (HoL)
  - Liability
- Negotiation
  - Offers/Recommendations
- Litigation
  - Proceedings
  - Enforcements

PERSONAS

- B2B Client Portal
  - View Progress
  - Manage Approvals / Authority
  - Self Service Portal
- Internal – Case Worker, Operational Oversight
  - Work Management
  - Reporting

MANAGEMENT INFORMATION

- Pro-actively monitor your work pipeline
- Understand resource bottlenecks
- Understand Settlement Rates
- Understand Reserve Roll-ups
- Monitor Contact Strategy Effectiveness

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IMPLEMENTING SHAREDO *ROLES & RESPONSIBILITIES*

BUSINESS POWER USER

- Document templates
- Forms & Questionnaires
- Party types
- Reports
- Security and Permissions
- Allocation rules

CONFIGURATOR

- Feature Config
- Work types
- Phase plans
- Smart plans*
- Portal & widget definitions

DEVELOPER

- Plugins
- Pipeline actions
- aspects

Section Six

THE *PLATFORM*

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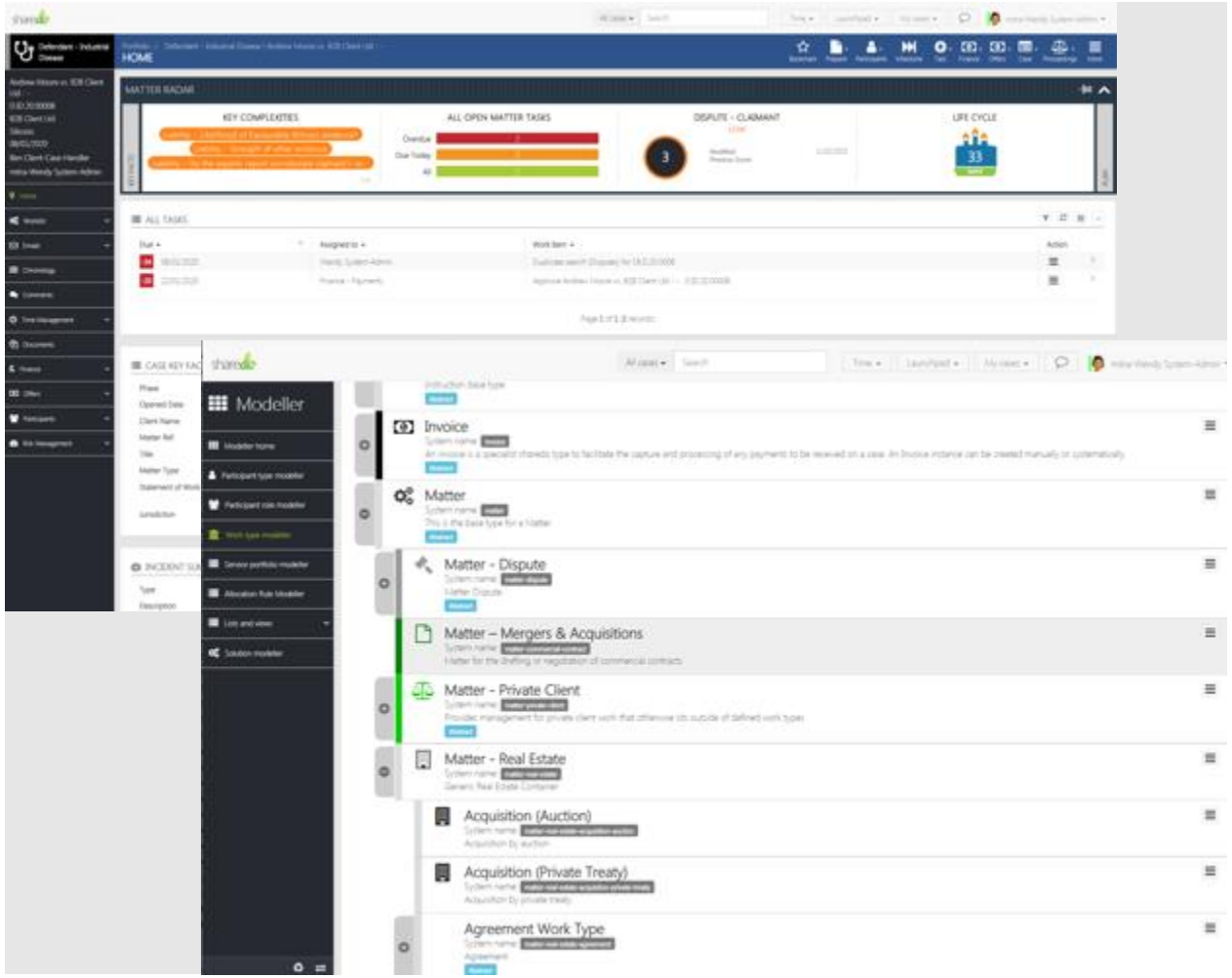
KEY FEATURES *MODEL UNLIMITED MATTER TYPES*

Within Sharedo you model unlimited work and matter types. These are defined as a “tree” enabling you to quickly specialise your configuration for different matter types or client specific needs.

- Define unlimited work types
- Quickly specialise existing work types for bespoke processing requirements
- Assemble Matter types from component parts including
  - Finance
  - Scorecards
  - Parties
  - Case Plans
  - Documents & Precedents
- Define case and client specific data capture.

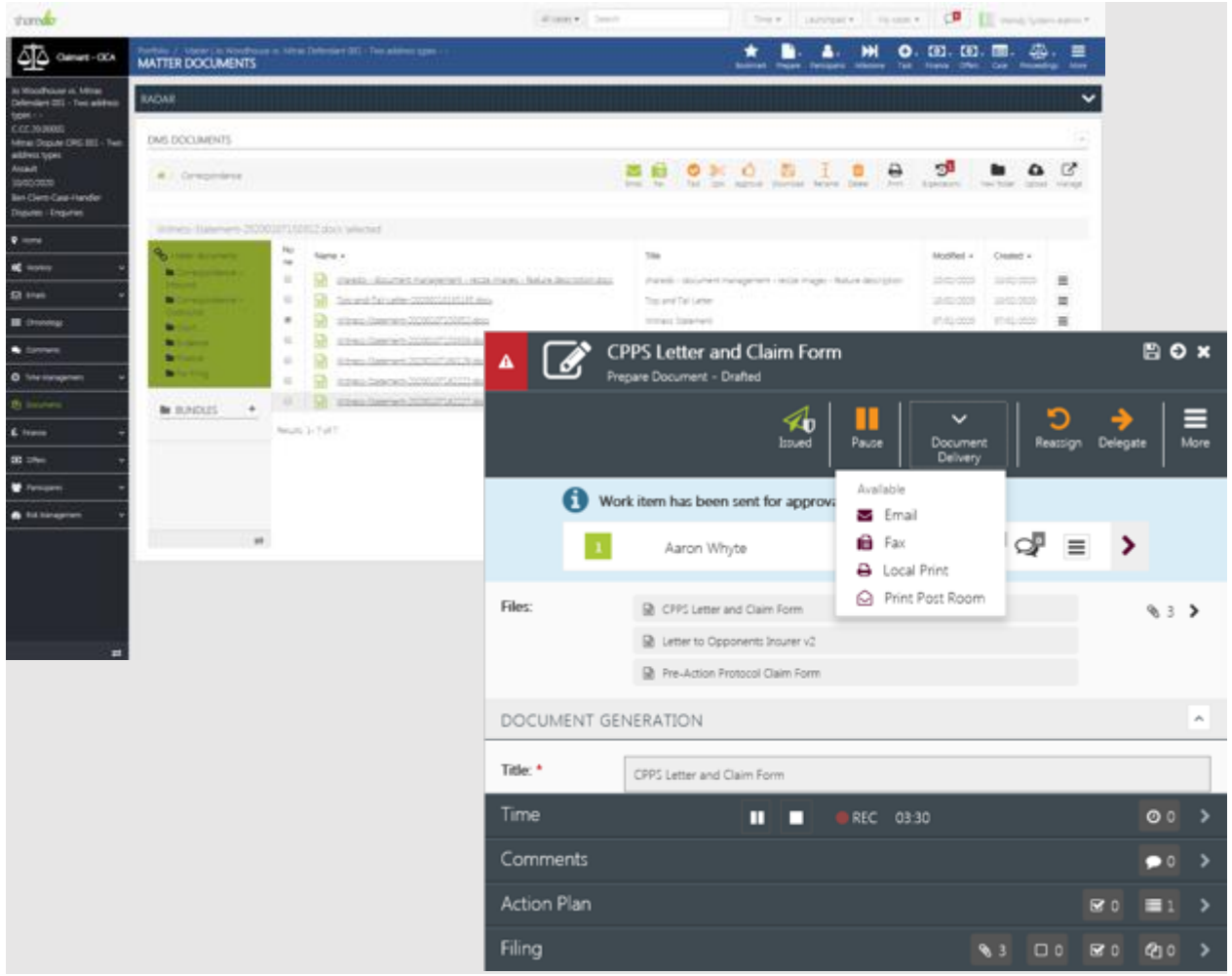


ShareDo

KEY FEATURES DOCUMENT MANAGEMENT & DELIVERY

Sharedo integrates seamlessly with your existing document management solutions such as iManage; providing a rich set of tools to manage, assemble, bundle and deliver documents to parties via numerous channels.

- Sharedo provides a live view of your iManage repositories. Your existing iManage plug-ins work seamlessly
- Assemble documents and emails automatically from templates using case data
- Produce and generate indexed court and disclosure bundles.
- Share documents via channels including;
  - Emails via Sharedo or outlook
  - VDR
  - Print (local or outsourced)
  - Portals
  - Docusign

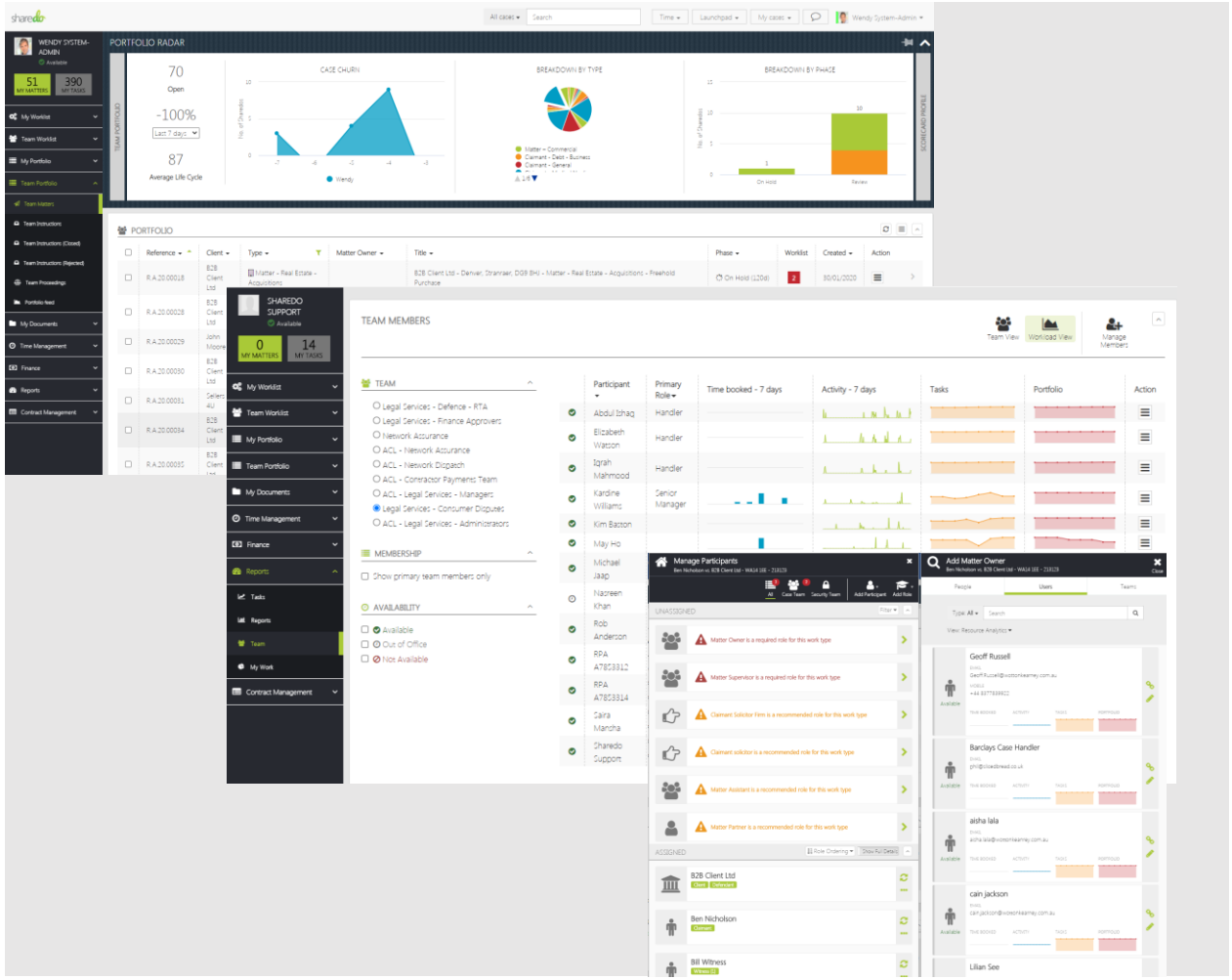


ShareDo

KEY FEATURES *LEGAL PROJECT MANAGEMENT*

Manage your matters as projects. Plan and manage tasks and SLAs against plans. View resource utilisation and select the right person for the job.

- Monitor & Automatically record time against activities to under cost to serve (you can use this for billing purposes also!)
- Plan your project activities against defined plans
- Define SLAs at case, activity and client levels. Receive notifications of any breach events
- Model your resource competencies and ensure that the right person is assigned to the right job
- Ensure that the right person is assigned to the right job through resource analytics and competencies

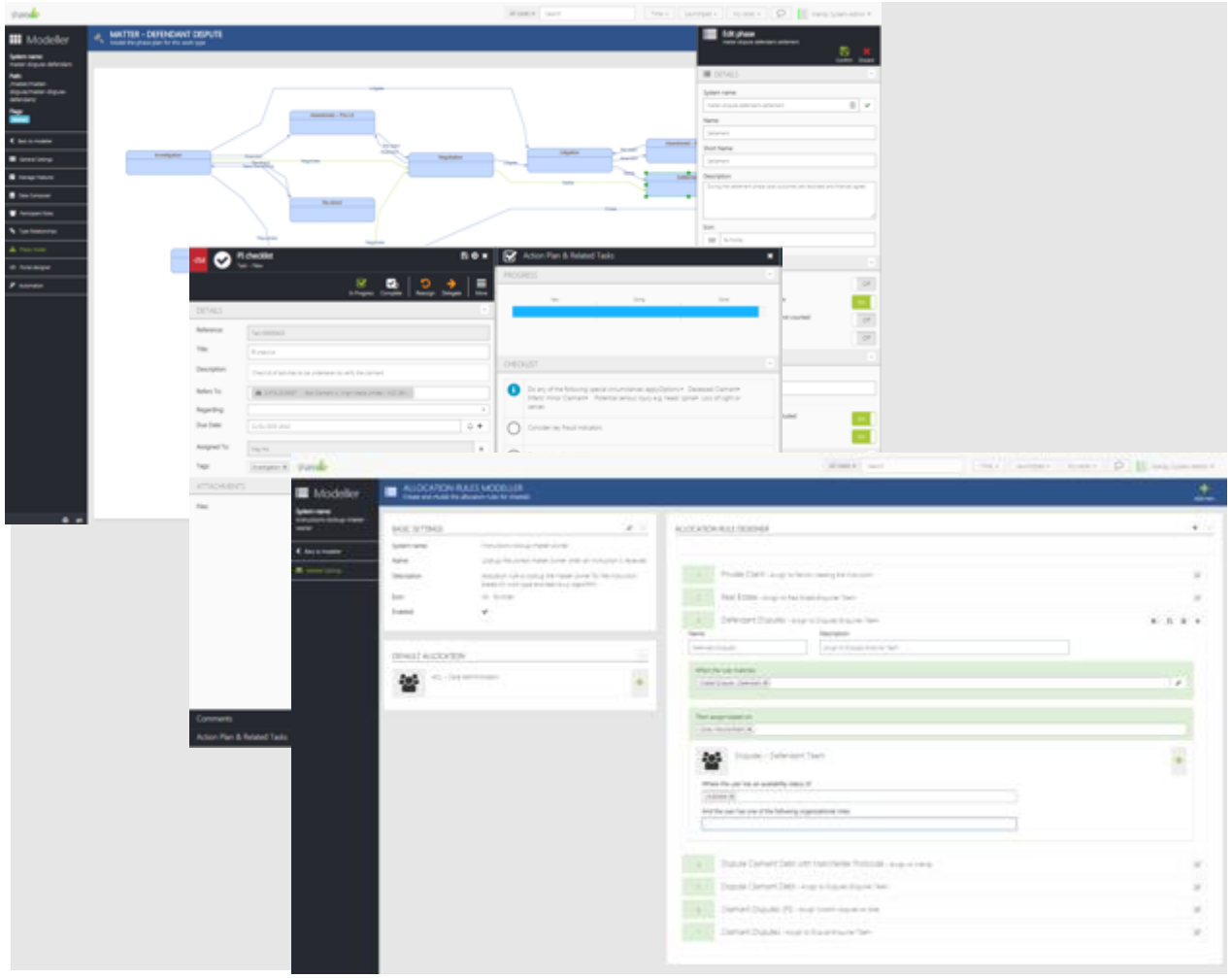


ShareDo

KEY FEATURES *CASE PLANS & WORKFLOW*

Adopt a continuous process improvement methodology by automating some of your key journeys.

- Define your top level matter plan for overall tracking purposes
- Model allocation rules to enable shared service centres and different disaggregation strategies
- Define automated workflows to streamline processes including
  - Automate Document Production and Delivery
  - Checklists & tasks
  - Calculate Fees
  - Schedule Appointments
  - And many more

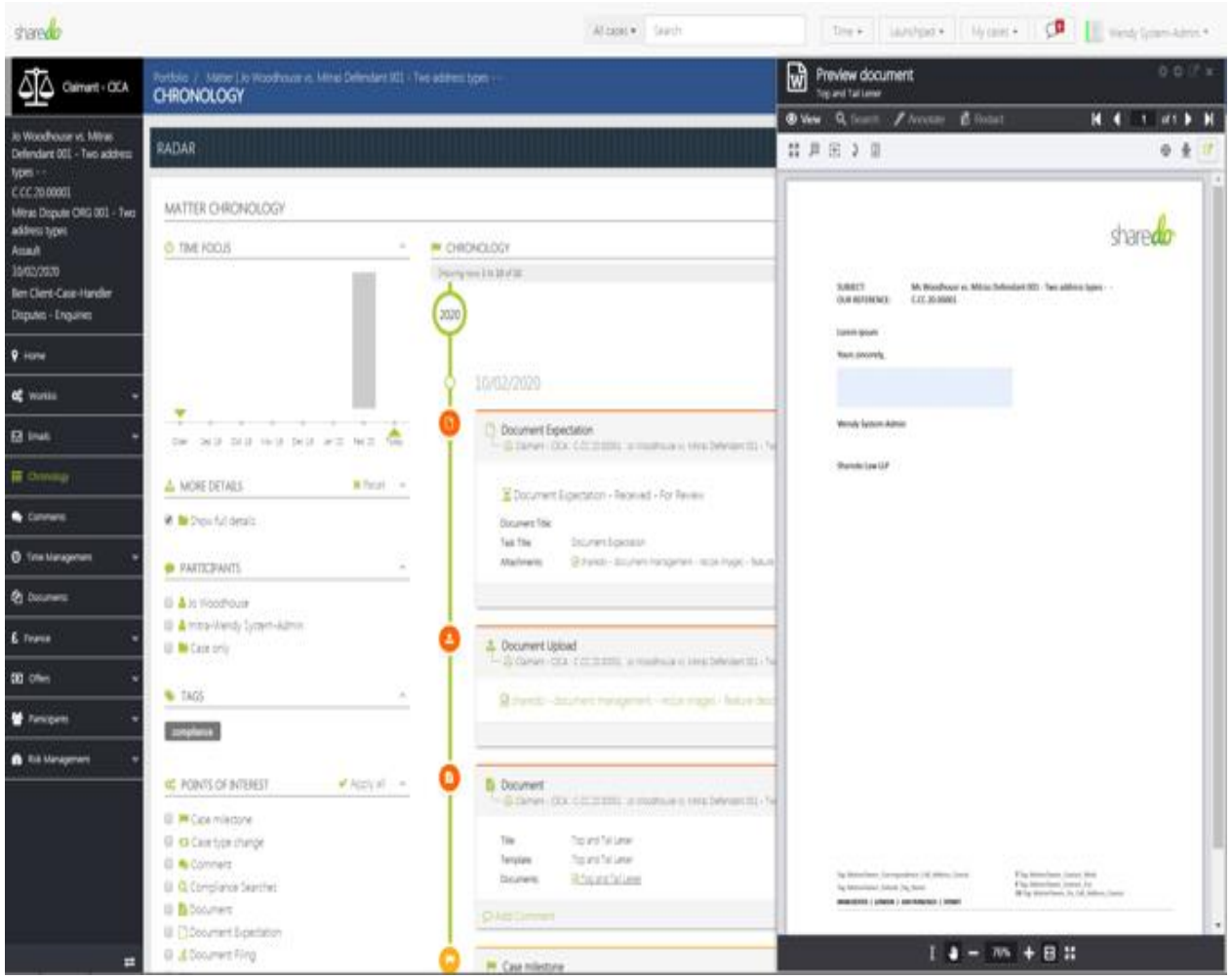


ShareDo

KEY FEATURES *AUDITABLE & INTERACTIVE CASE HISTORY*

Whenever any party interacts with Sharedo audit events are generated enabling you to see a historic view of all of the activities that have happened on your matter.

- View fine grained audit or an interactive case chronology
- Quickly slice data by
  - Date
  - Party
  - Point of Interest
  - Tag
- Click through chronology cards to
  - View Documents or Emails
  - Interact with the activity.

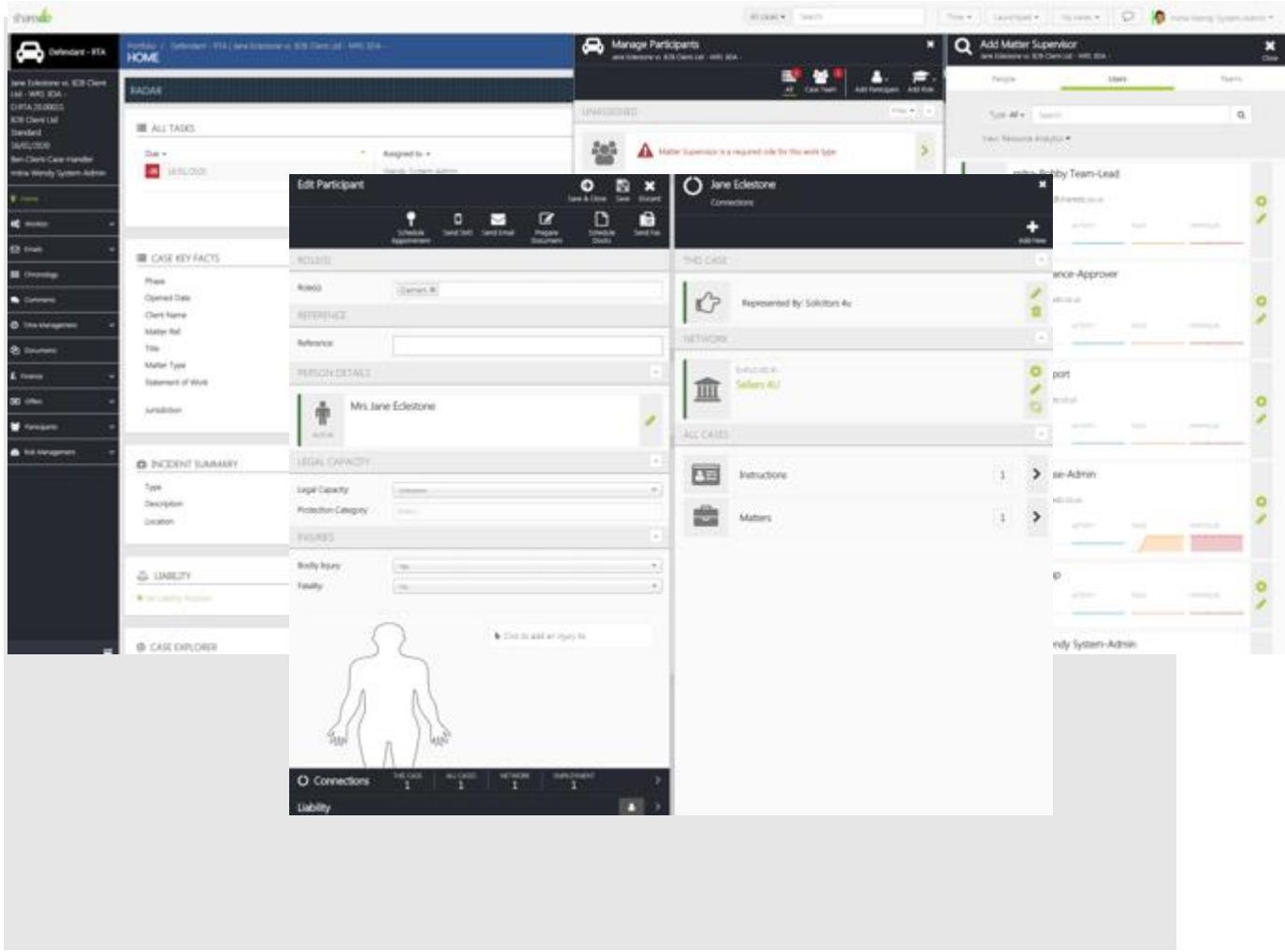


ShareDo

KEY FEATURES *PARTIES & CRM*

Sharedo acts as a pseudo customer relationship management system for your matters and other work items.

- Manage a master database of all contacts across the solution
- Segment these by Party type to enable specific analysis of types of parties
- Define custom data capture for your parties
- Provide a 360 degree view of a parties interactions across matters
- View a chronology of all of your interactions with a party across the system
- Quickly contact your parties via SMS, Email, Fax, Post or Portal



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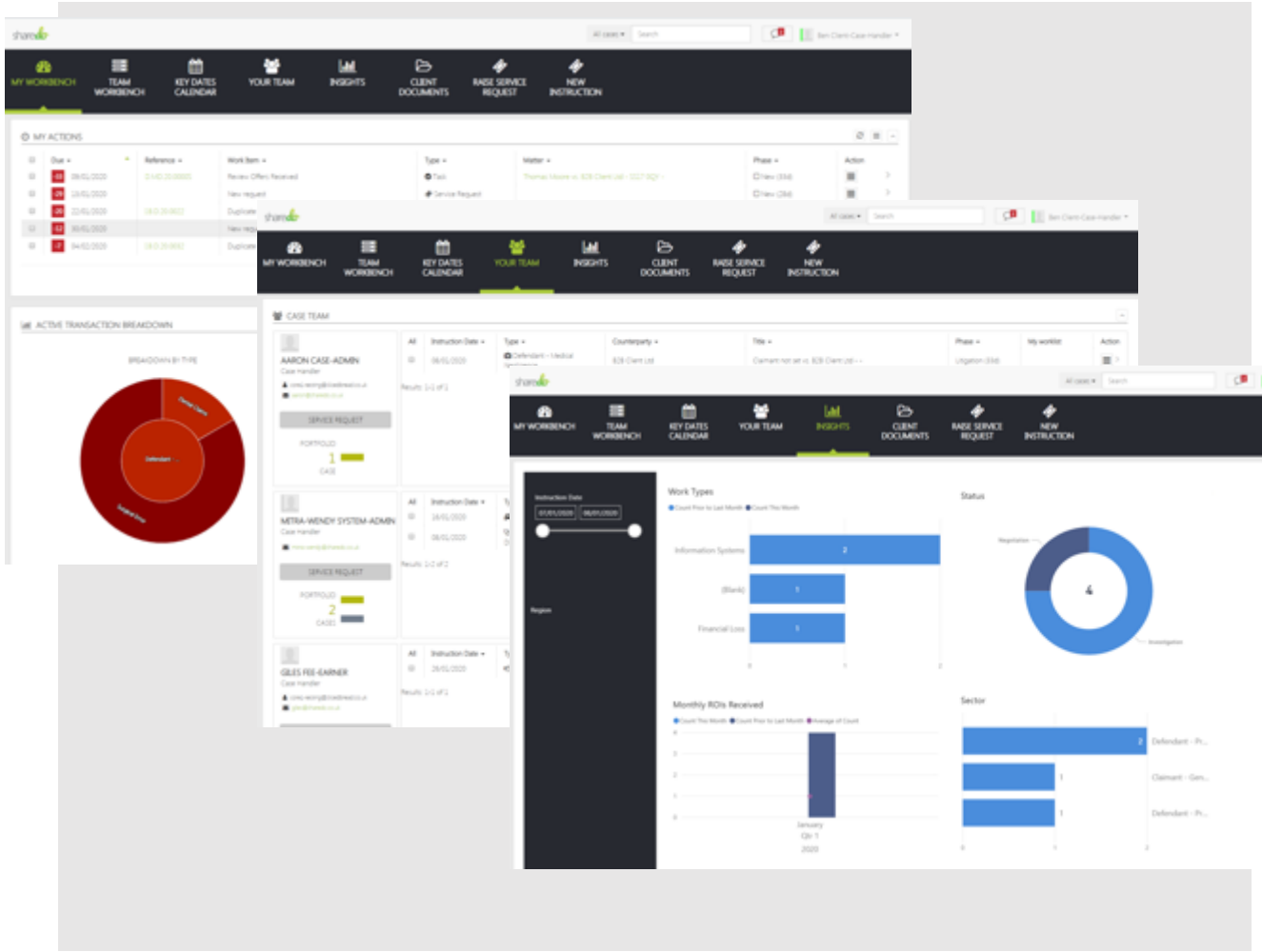
KEY FEATURES COLLABORATION & CLIENT PORTALS

Sharedo makes no material distinction between internal and external participants. You define the “personas” that specific people use to access the system and how they view key information.

- Define different “persona” views of the system such as
  - Fee Earners
  - B2B Clients
  - B2C Clients
- All persona views enable a “live” view of Matter information subject to the visibility and access controls that you define
- Model case plans to maximise your interactions with clients via portals to minimise re-keying and streamline processes.
- Enable access to key reports via portals
- Send automated notification to portal users to direct them towards key information



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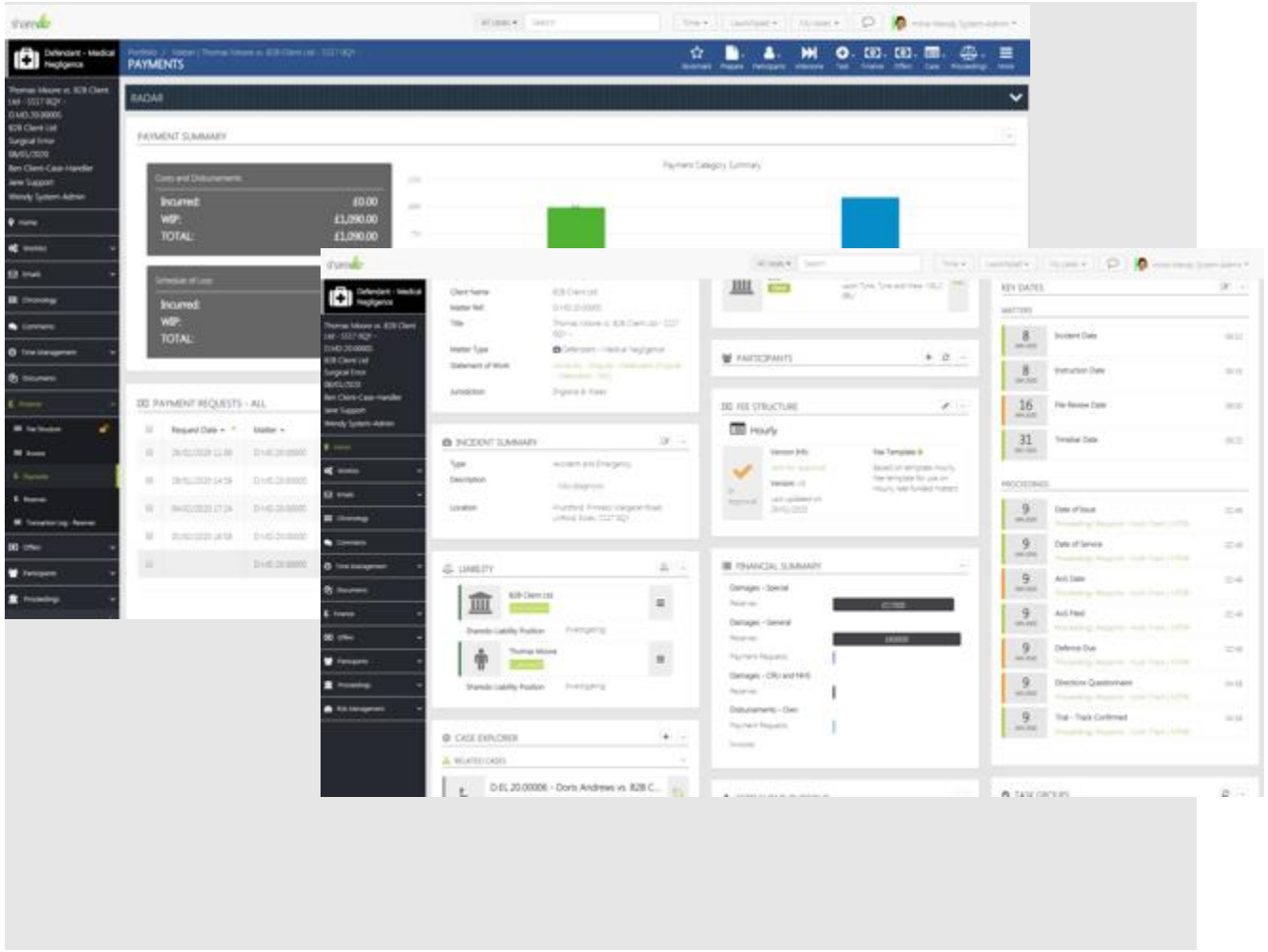
KEY FEATURES *MATTER FINANCIALS*

Manage a case account to understand the different financial aspects of your matter including budgets, fees, invoices, payments and settlements

- Configure and visualise your case financials for different use cases
  - Disputes
  - Real Estate
  - Matter Management
- View and record payment requests and manage payment approval processes subject to authority limits
- View and record Payment Expectations and manage through approval processes
- Capture your matter budgets and see erosion of these through transactions.
- Record Fee Structures, version control and collaborate with clients on estimates and actuals to reach agreement

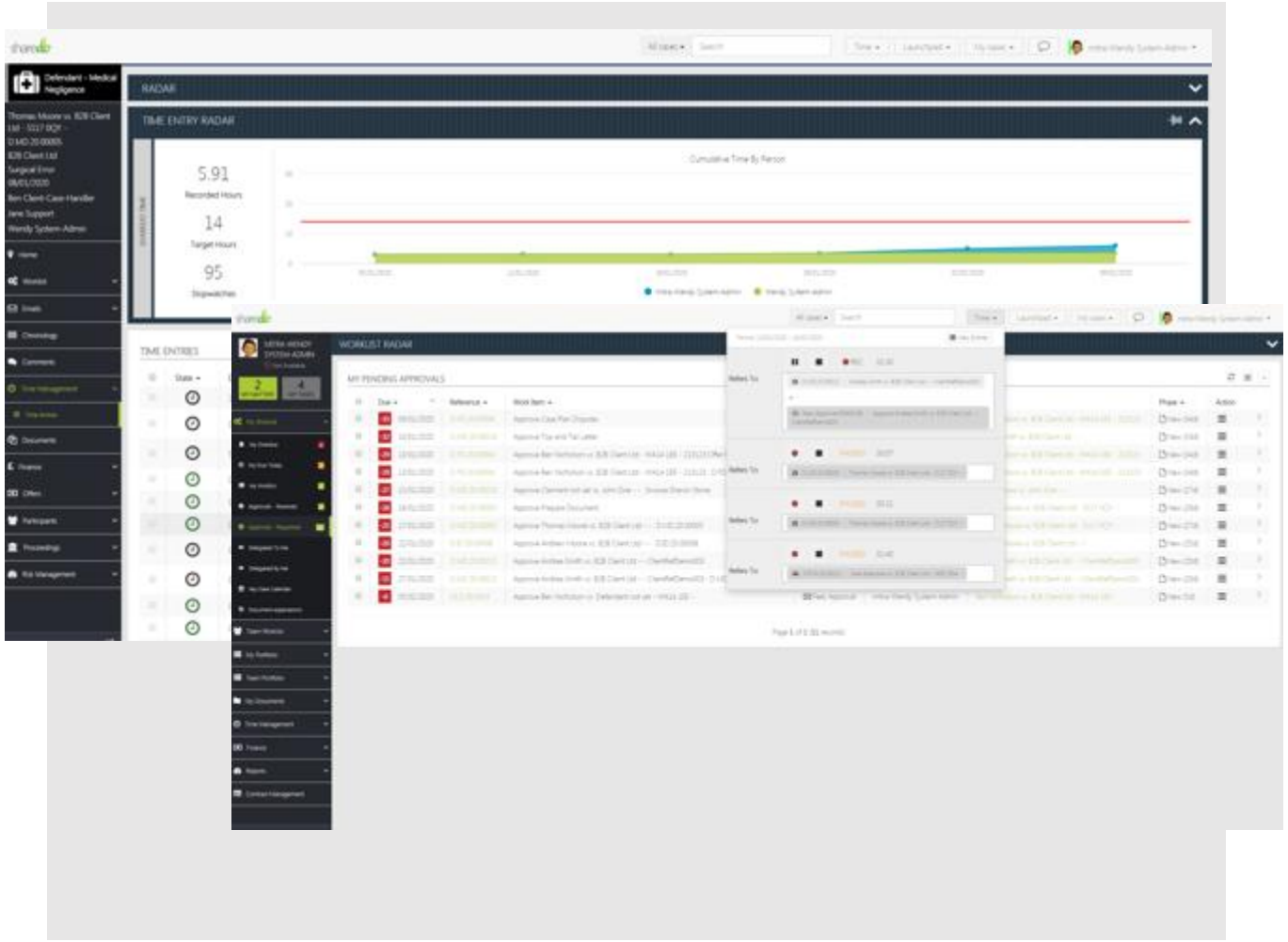


ShareDo

KEY FEATURES *TIME RECORDING & COST TO SERVE*

Configure Sharedo time recording either for the purposes of billing or to understand the cost to deliver a matter type.

- Configure Sharedo time recording to work in either a passive or active mode
- Passive time capture can be configured to work completely behind the scenes with no user interaction.
- Active time capture can be configure with a full range of time and billing codes for complex client billing requirements
- Define time targets at a matter, personal or team level.
- Track time against targets; trigger alerts and workflows when targets are missed or in danger of being missed.



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KEY FEATURES *OMNI CHANNEL*

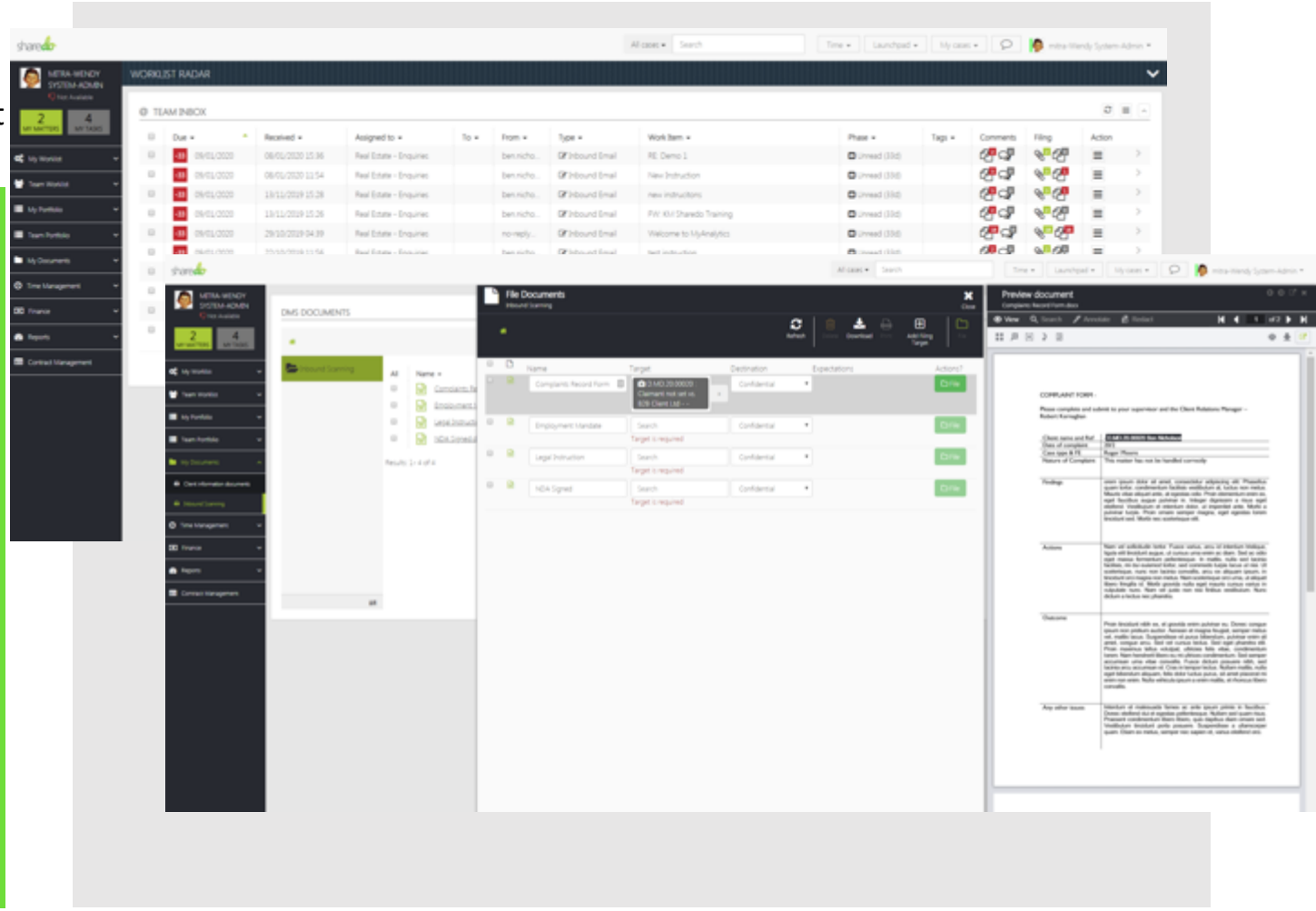
Sharedo enables you to manage all of your inbound and outbound channels through a single interface regardless of whether the communication is received via SMS, Email, Fax, Post or the like.

Inbound

- View your inbound communications through a single inbox.
- Configure allocation rules to route inbound comms to the appropriate team or person
- Integrate your MFD scanners into Sharedo to enable rapid filing of post

Outbound

- Quickly send communications to nominated parties via SMS, Fax, Email, Docusign or Post
- Quickly configure post; full support for both internal and outsourced post rooms.



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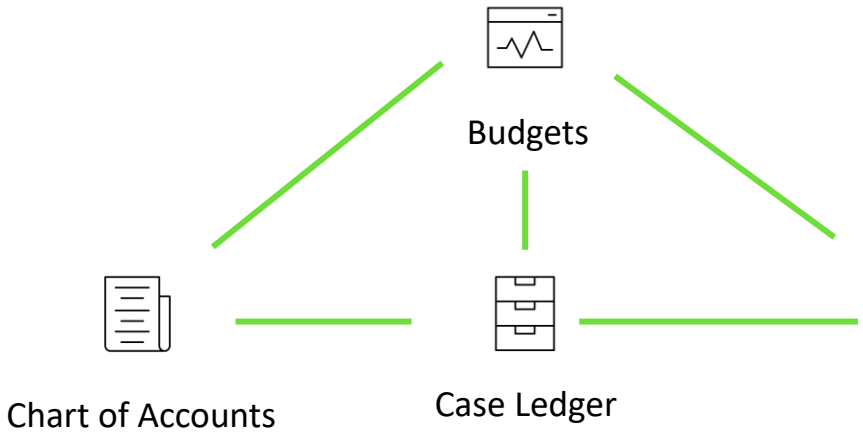
KEY FEATURES *FINANCE*



Finance Transaction Types

- Account Adjustments
- Payments
- Invoices
- Invoice Payments & Payment Plans
- Offers
- Time
- Fees

Supporting Features

- Multi Currency
- Goods & Services
- Units of Measure

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KEY FEATURES *FINANCE ROADMAP*

Budgets

Enhanced cost budgeting support

Account Adjustments

Client Office Account Management

Time

Internal cost calculations

Invoices

Invoices -> Fees / Disbursements

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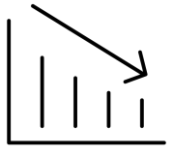
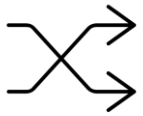
KEY FEATURES *PREDICTIVE MODELS*

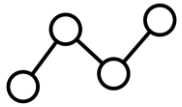


Data Quality Rules



Data Projection Framework

Train Model



Deploy

- Cycle Time
- Cost to Supply
- Busyness
- Allocation
- Sign-offs
- Time Codes
- Awards / Reserves
- Fees
- Risk Scores

1 Data Preparation

Designed to maximise data quality and intelligently extract sets of this data for ML Models

2 Model Preparation

Azure Machine Learning

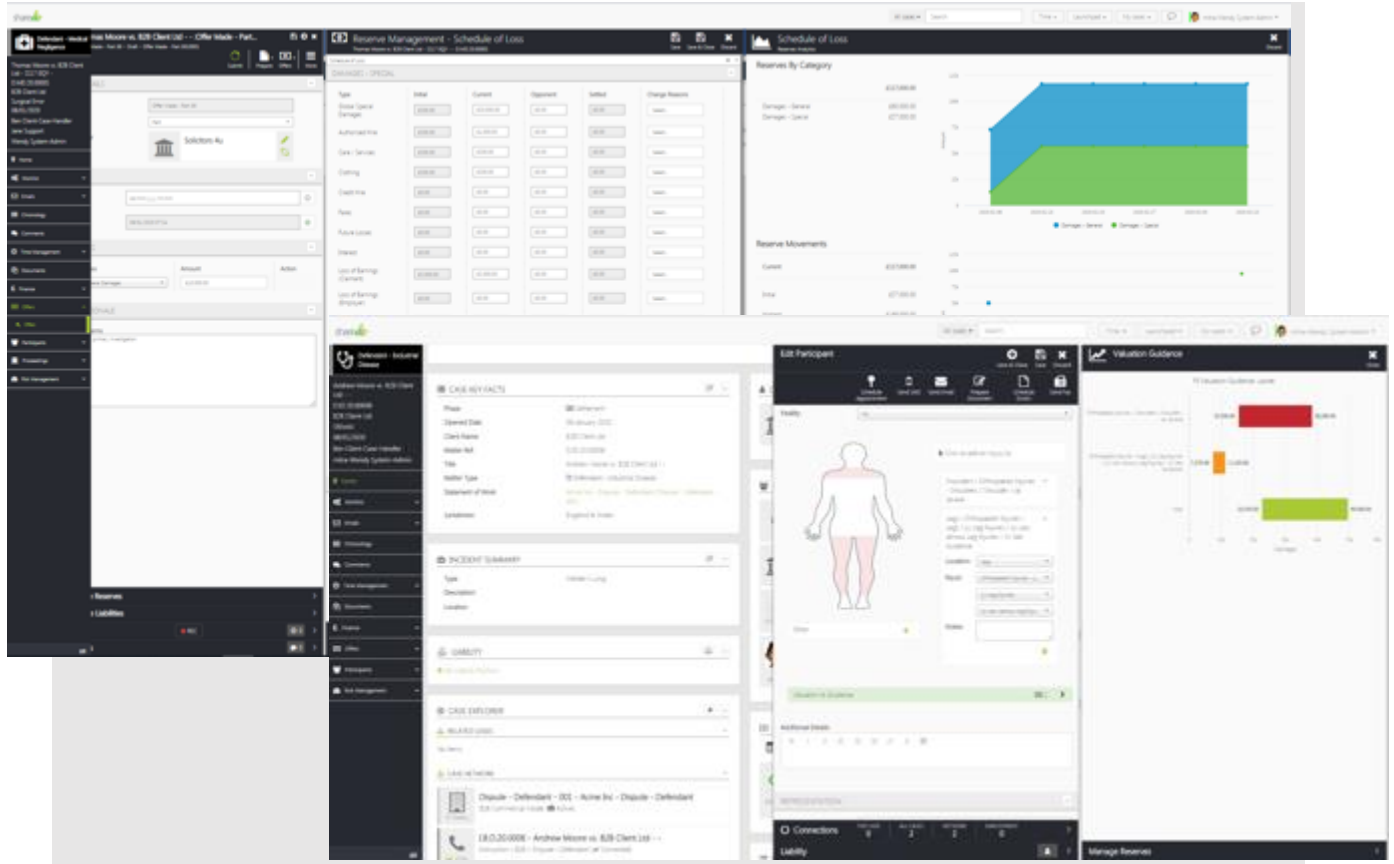
3 Model Consumption

Provide easily accessible “hooks” in which the application can ask questions of models

KEY FEATURES *DISPUTES & LITIGATION*

Over and above its core matter management functionality Sharedo provides extensive support for Dispute Matter types whether they be claimant or defendant; volume or bespoke.

- Extensive support for litigation including
  - Witness Citations
  - Court Time Tables
  - Multi Jurisdictional
  - Hearings
- Manage complex multi claimant / defendant relationships including multiple positions on liability.
- Build and track positions on Reserves and Awards; measure and advise on these based on Valuation providers e.g. LawTel.
- Manage offer lifecycles and provide guidance to users on appropriate valuations.



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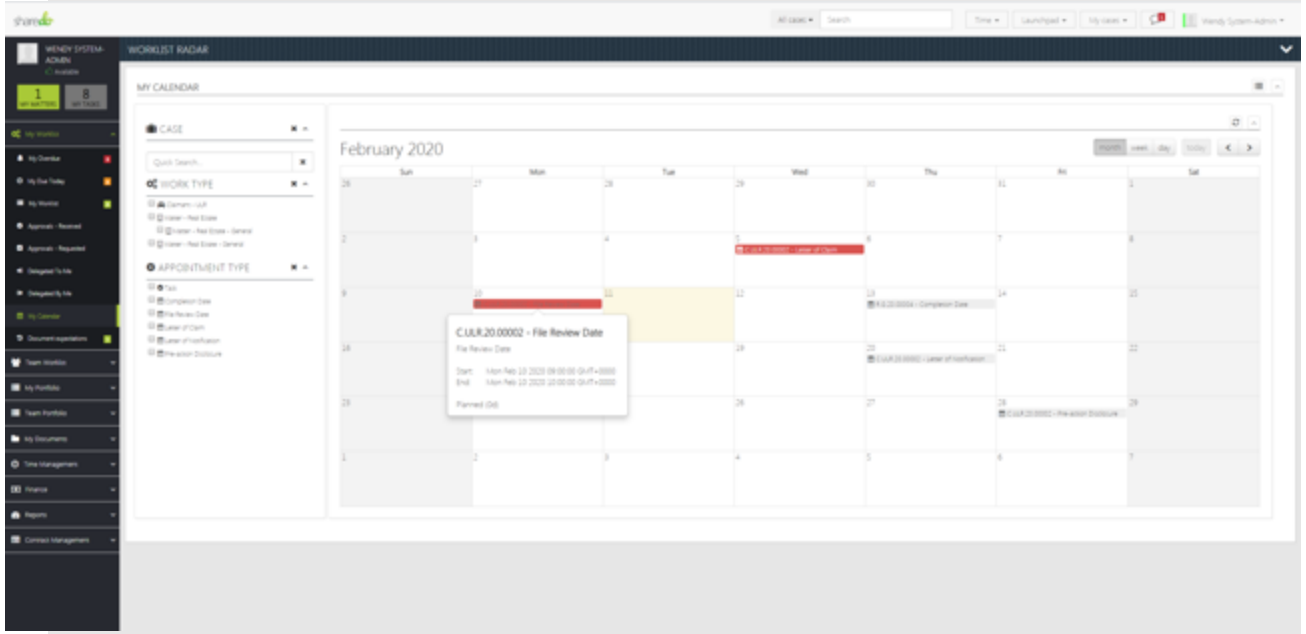
KEY FEATURES *EMAIL WORK THE WAY YOU WANT TO*

Sharedo works alongside your existing outlook and iManage environments enabling you to work the way you want to.

- Configure Sharedo to work with personal or team email boxes.
- Drag and drop emails into Sharedo and have them filed and routed automatically. No outlook plugins are required.
- Track emails through luggage tags
- All access to outlook or exchange environments is entirely end user permission driven.
- Synchronise key dates and other appointment information to your outlook calendars.
- Works in conjunction with existing iManage plugins



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THANK YOU *FOR LISTENING.*

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ICONOGRAPHY

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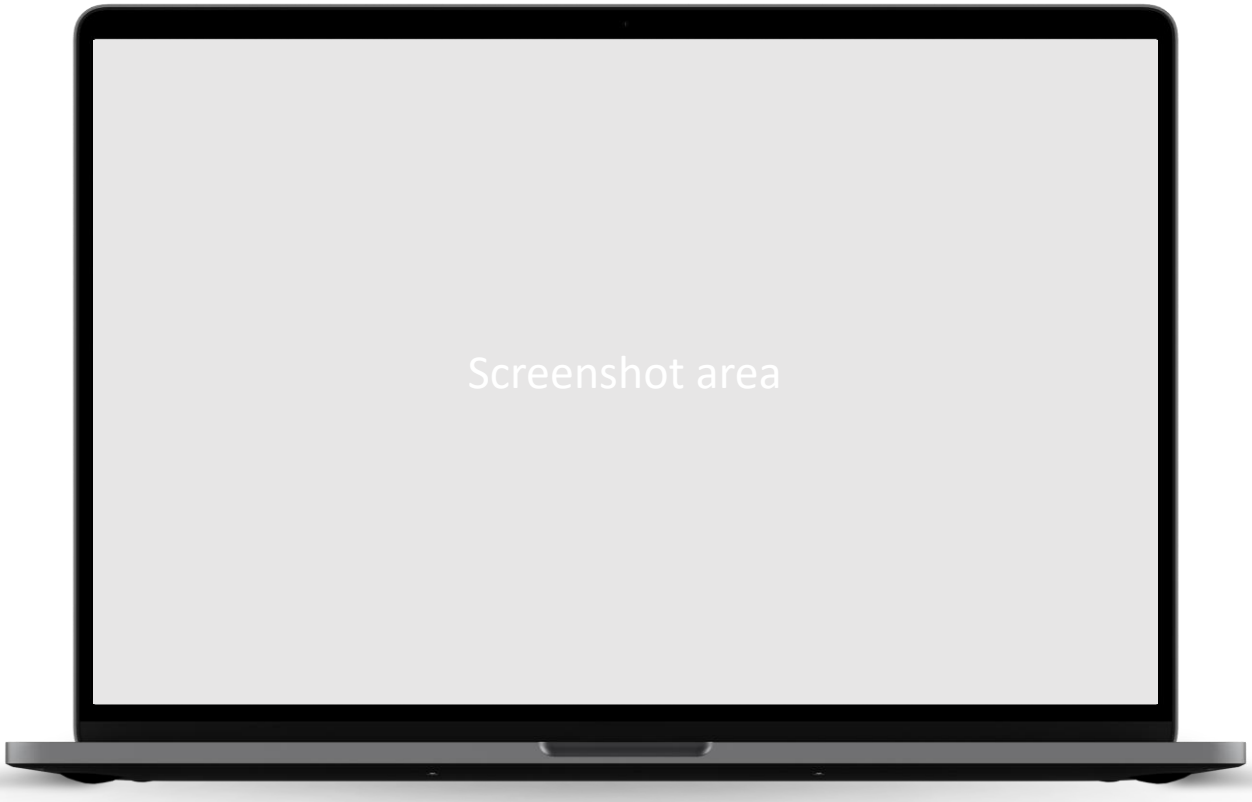

WORK SMARTER
REDUCE COST TO SERVE

- Track cycle times and cost to serve at all levels in the work hierarchy
- Implement strategies for **disaggregation**, resource levelling through to **straight through processing**

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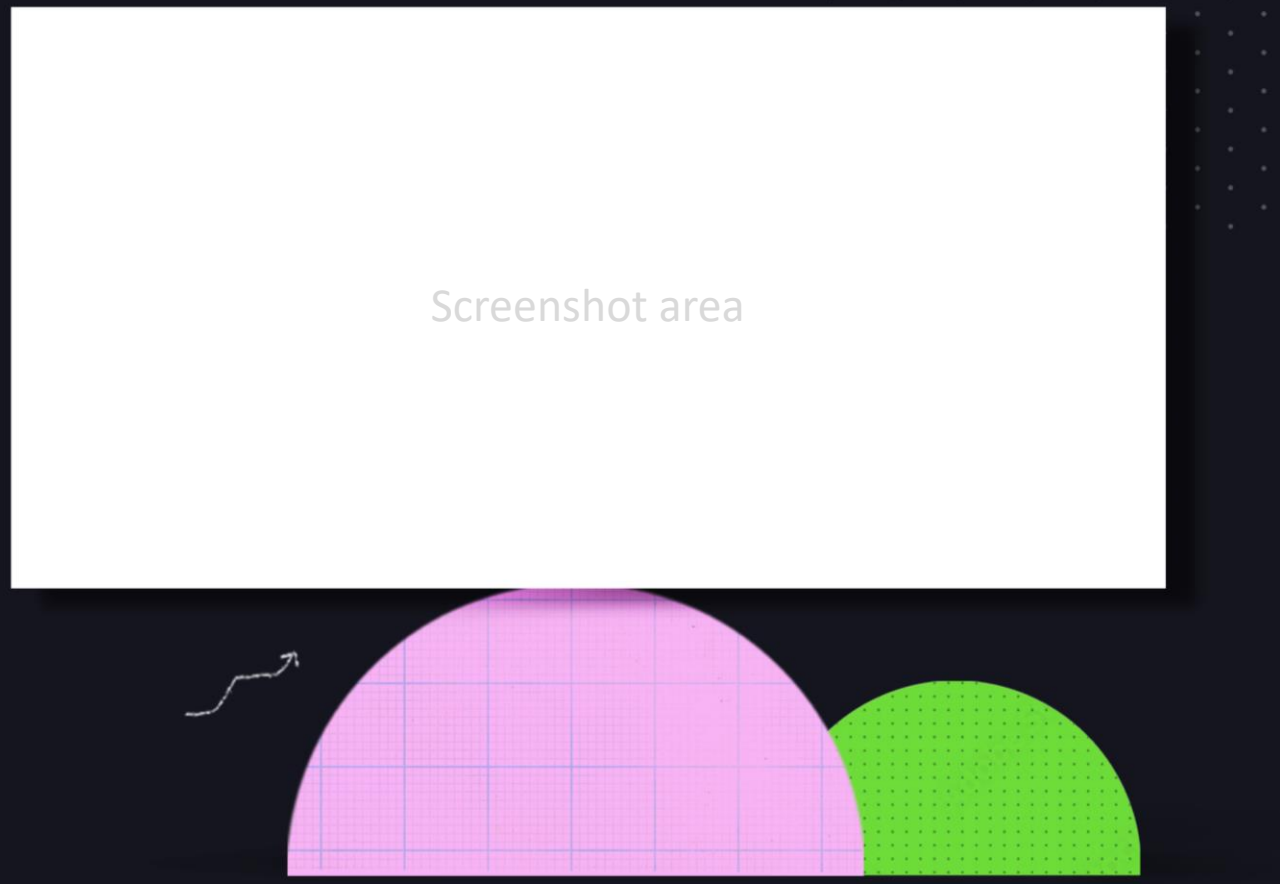
WORK SMARTER
REDUCE COST TO SERVE

- Better processes, better efficiency
- Sharedo's complex event processing and workflow engine supports multiple work styles.

  Proactive SLA management
  Disaggregation
  Assistive Guidance
  Progressive Disclosure
  Straight Through Processing



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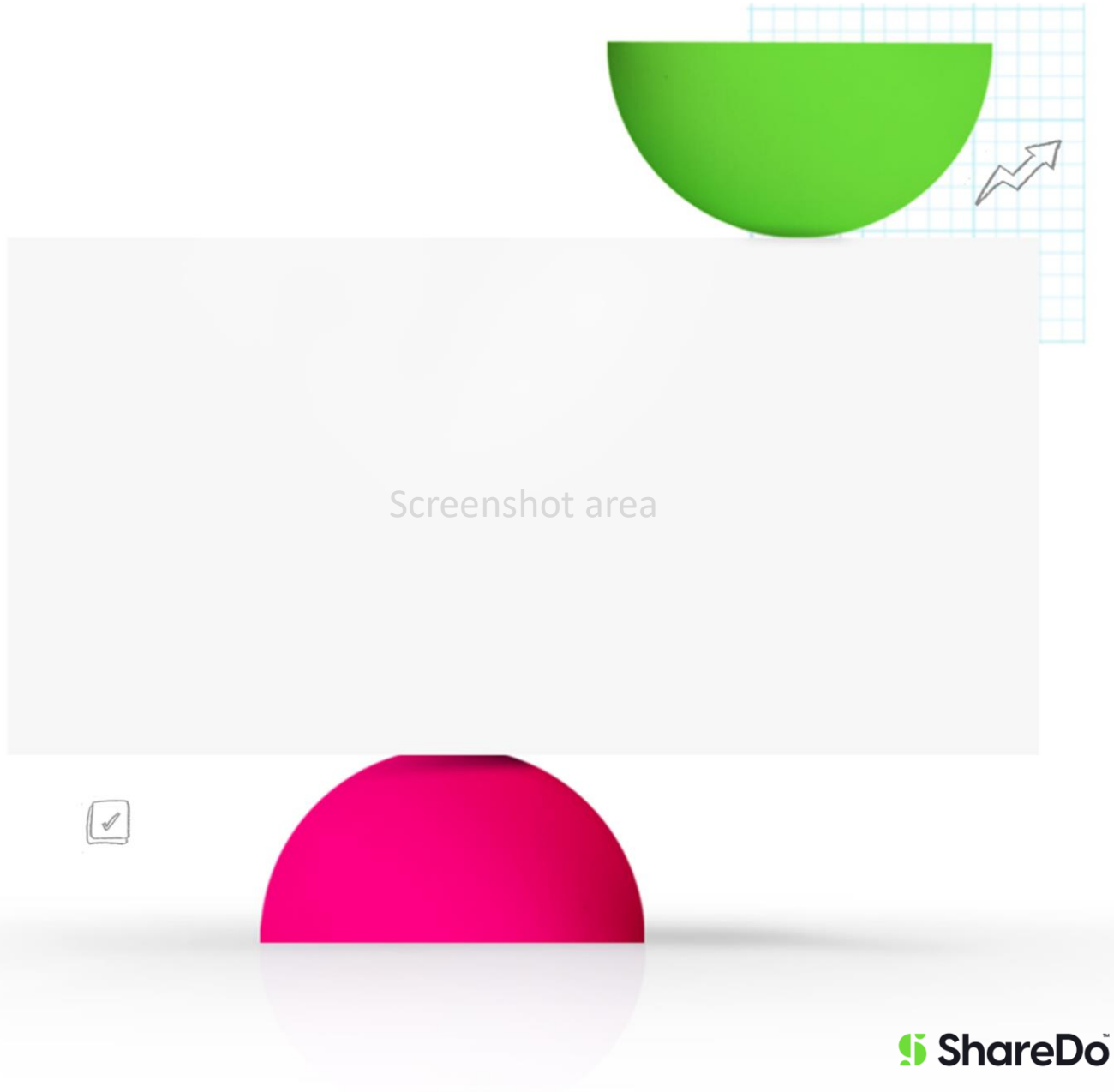
WORK SMARTER
REDUCE COST TO SERVE

- Your people are your **biggest cost**.
- Sharedo **surrounds them** with a single consolidated digital assistant.
- Optimised UX to help work be performed more efficiently and with **less stress**.



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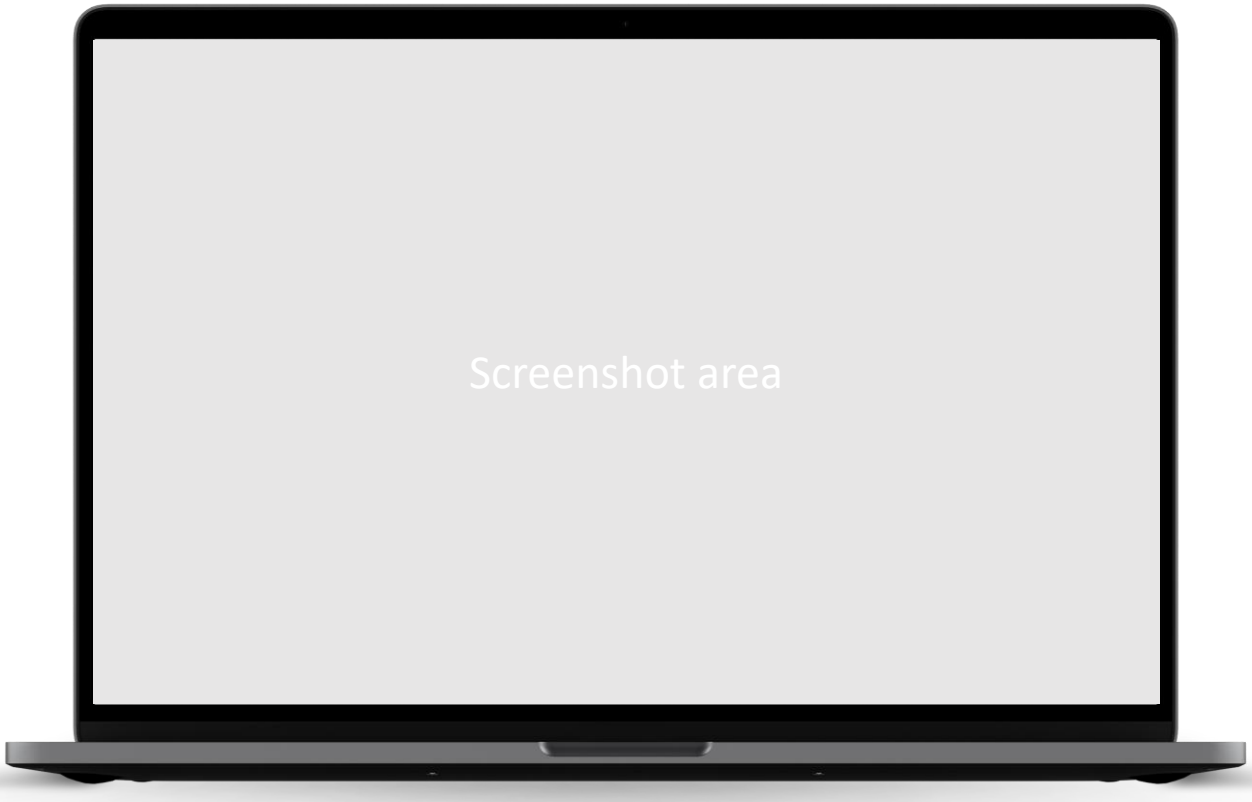

Resource Allocation

Competitive Insights

Process Performance

WORK SMARTER
BECOME DATA DRIVEN

- Sharedo learns with every case and acts as your own personal data scientist
- Analysing data in near real-time Sharedo provides you you with actionable insights.
- Insights are weaved throughout the user experience to help you make informed decisions.

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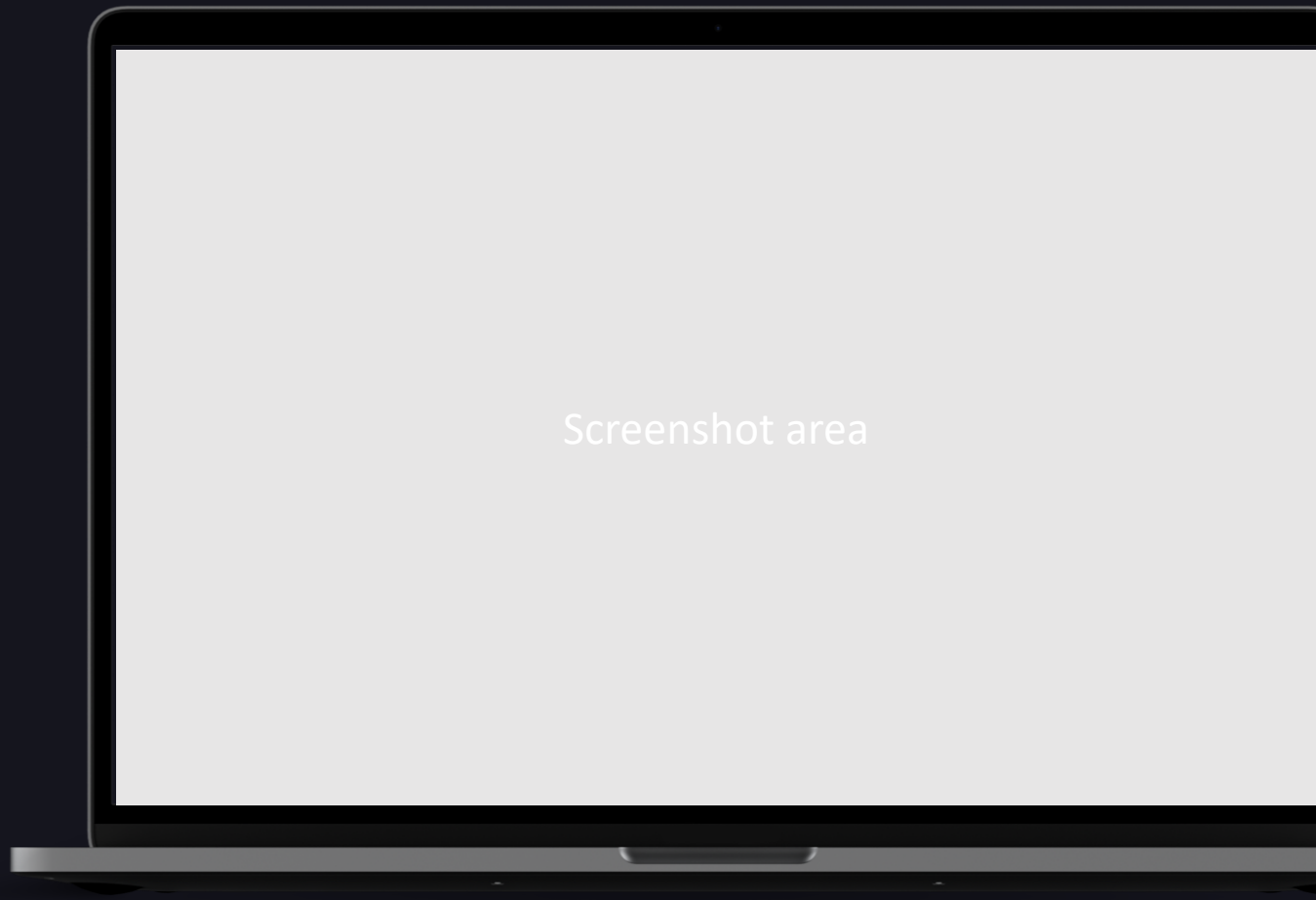
WORK SMARTER
ADAPT TO CHANGE

- Configure Sharedo to handle any work type.
- Dynamically personalize & optimize the experience for every user
- Leverage Solution Packages to expedite delivery



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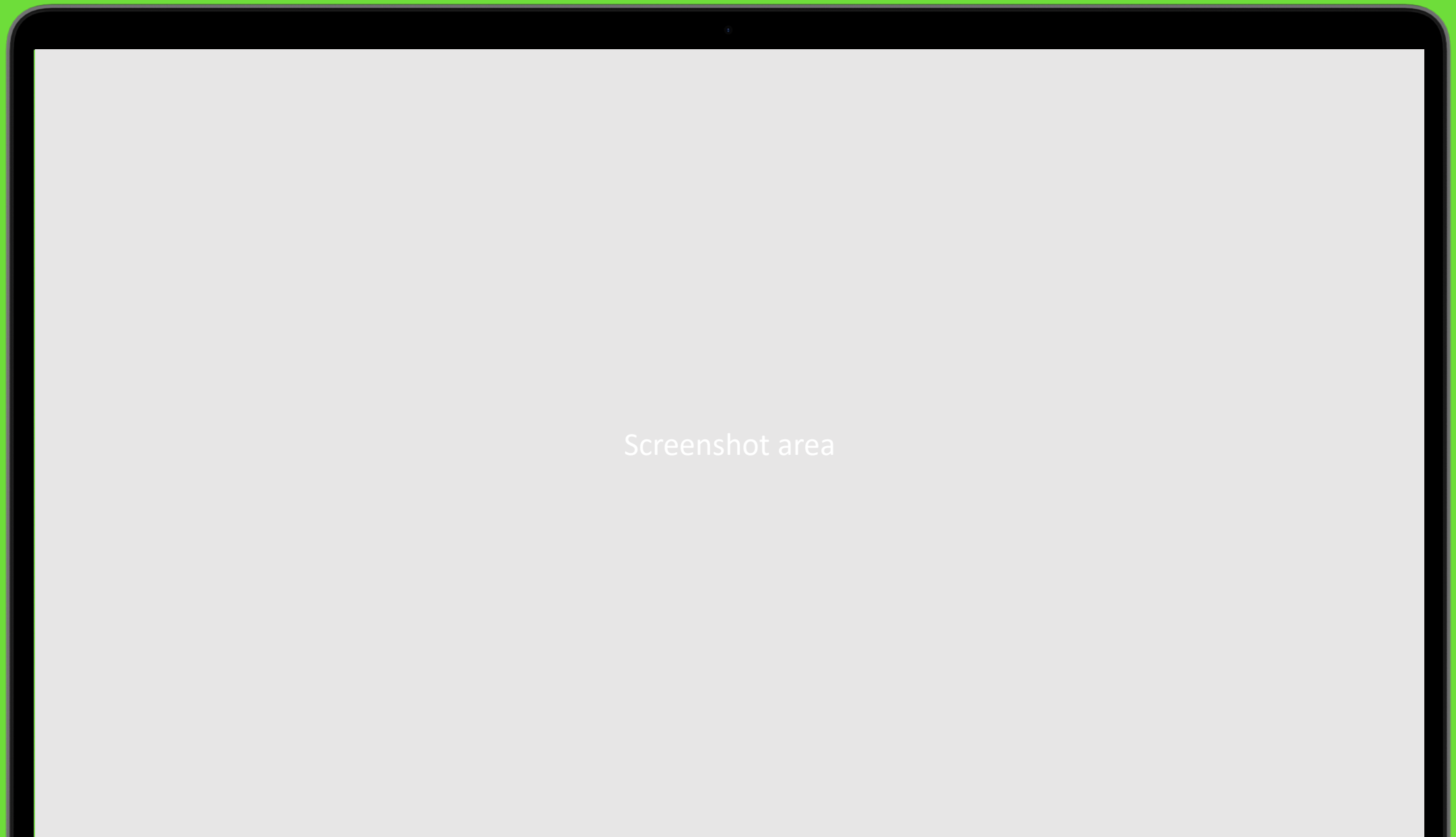
Screenshot area

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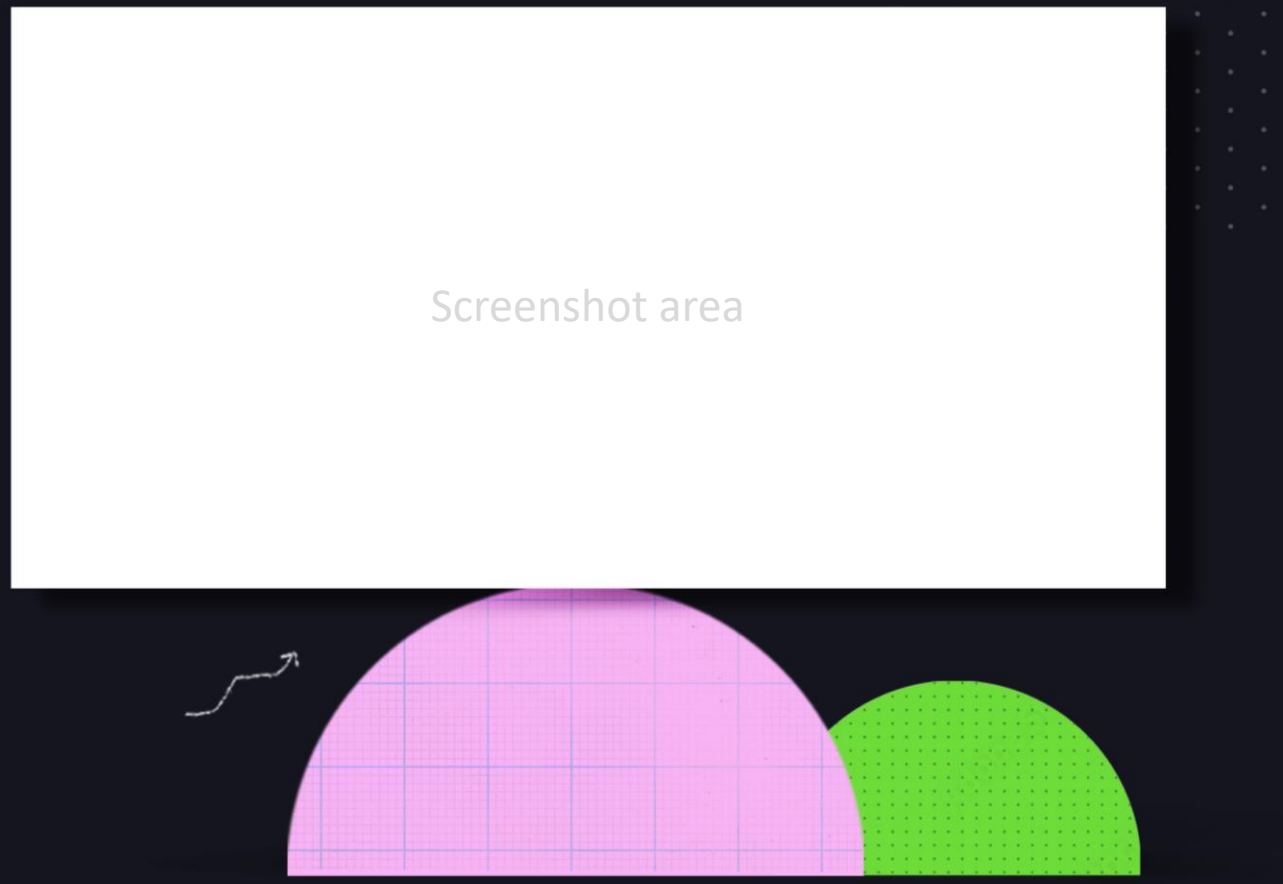

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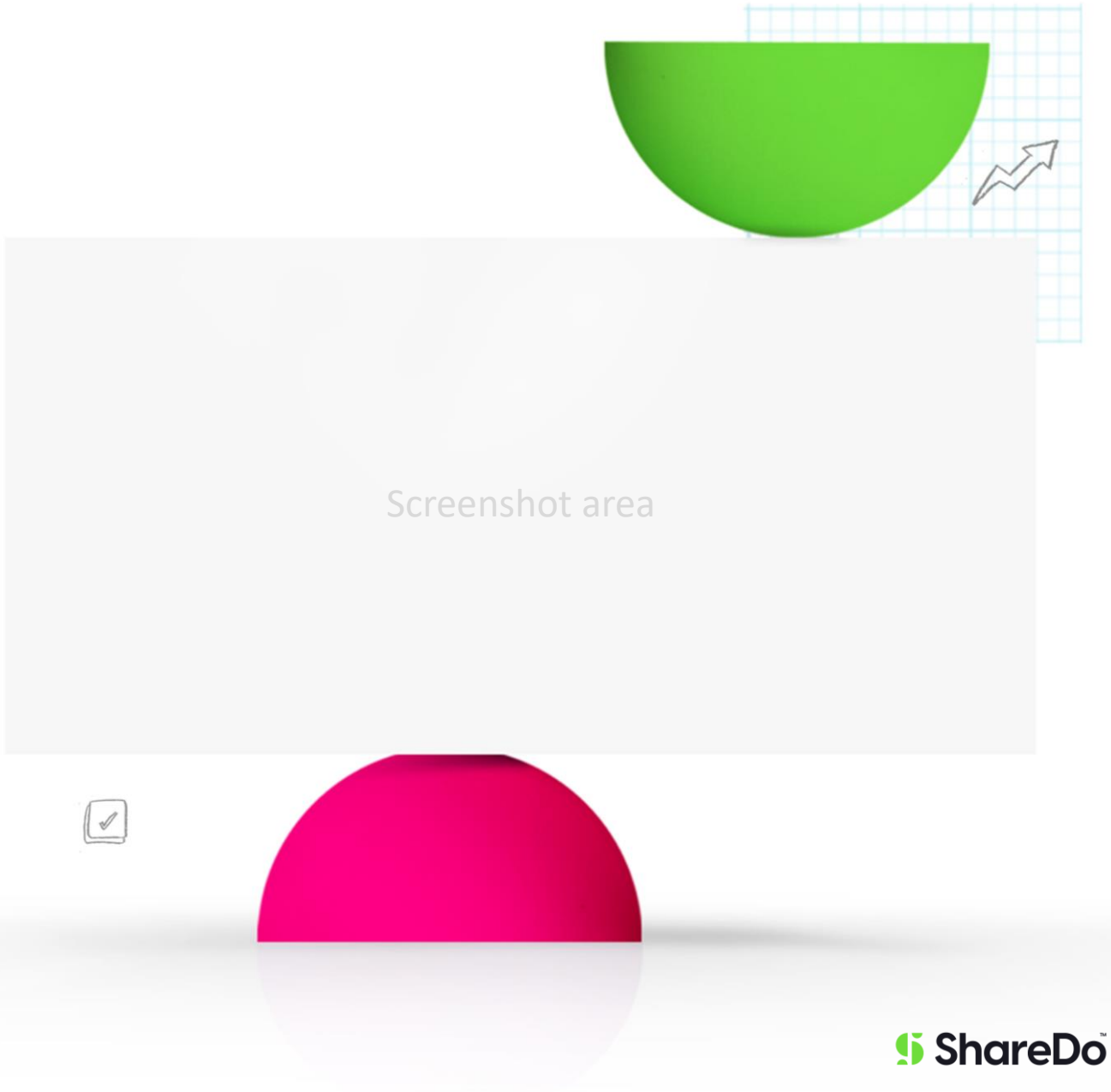

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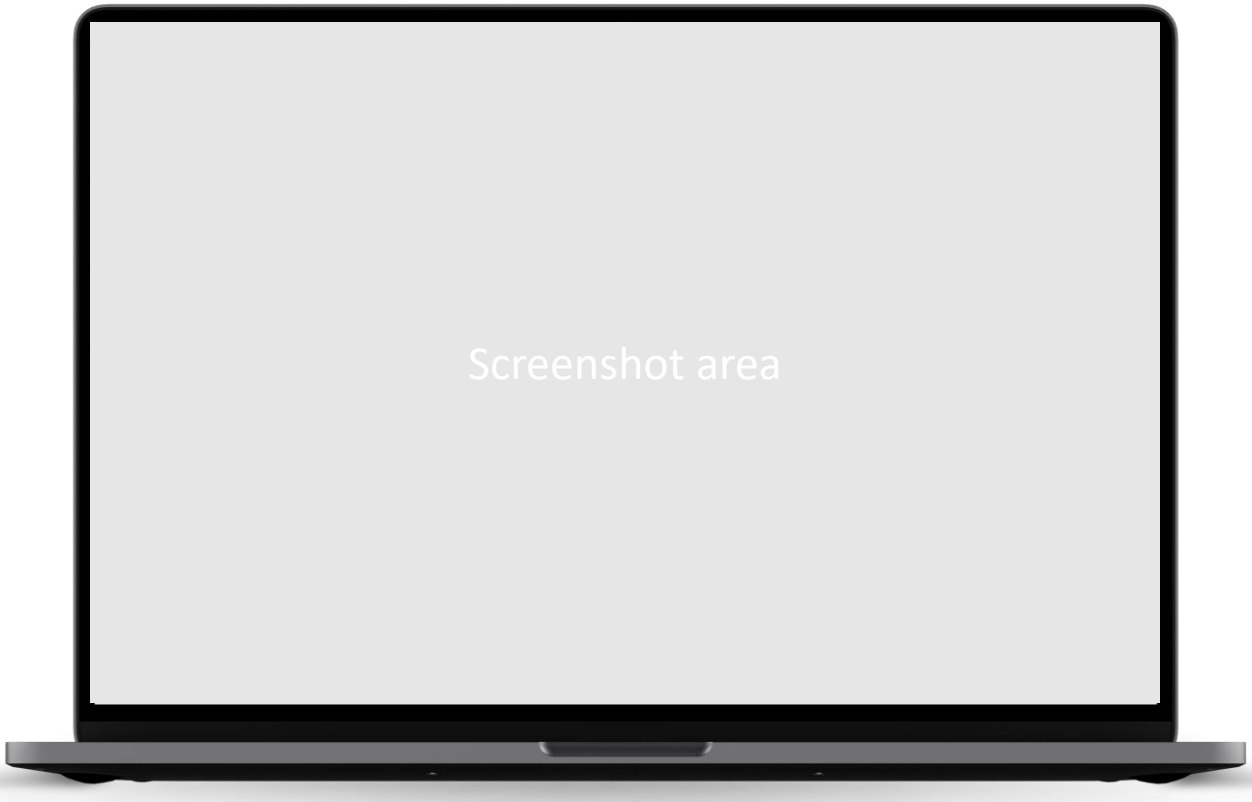

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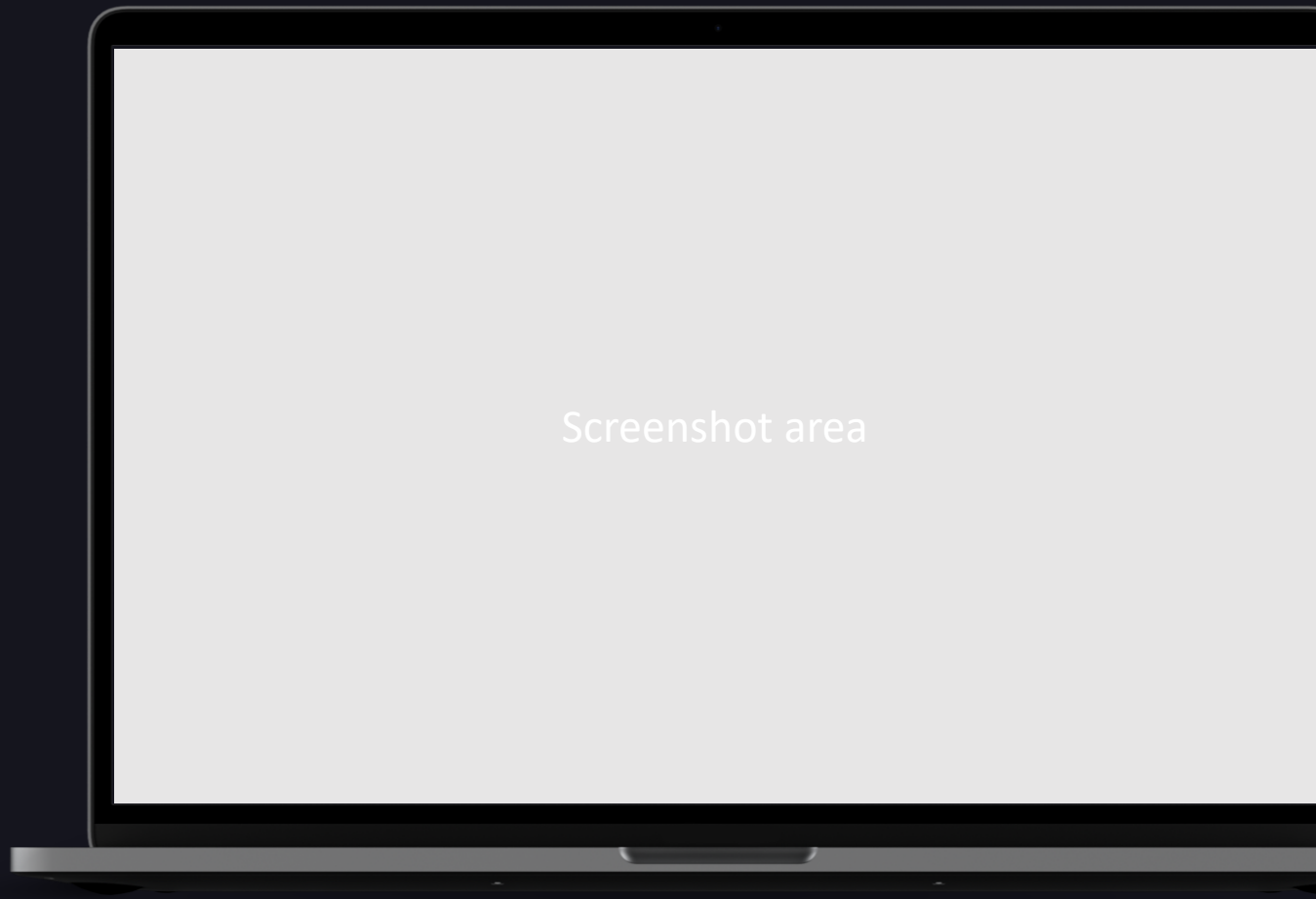

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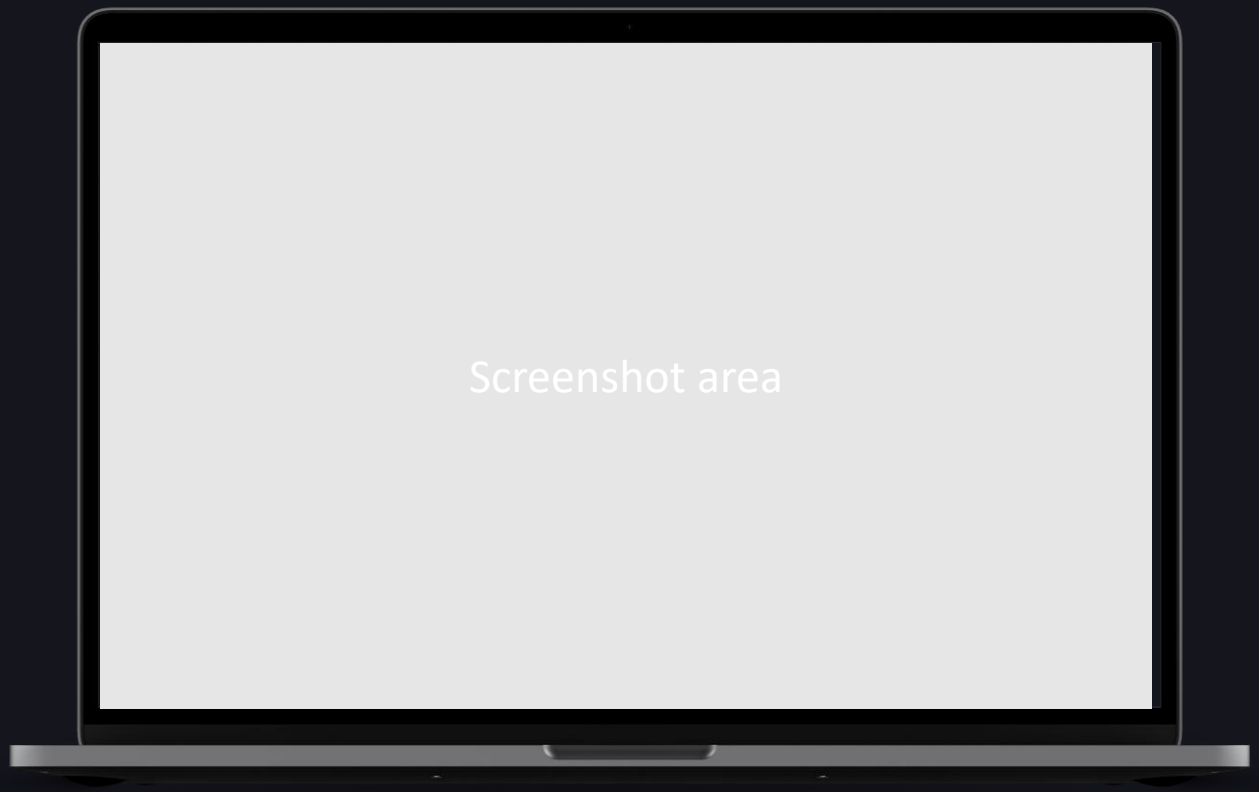

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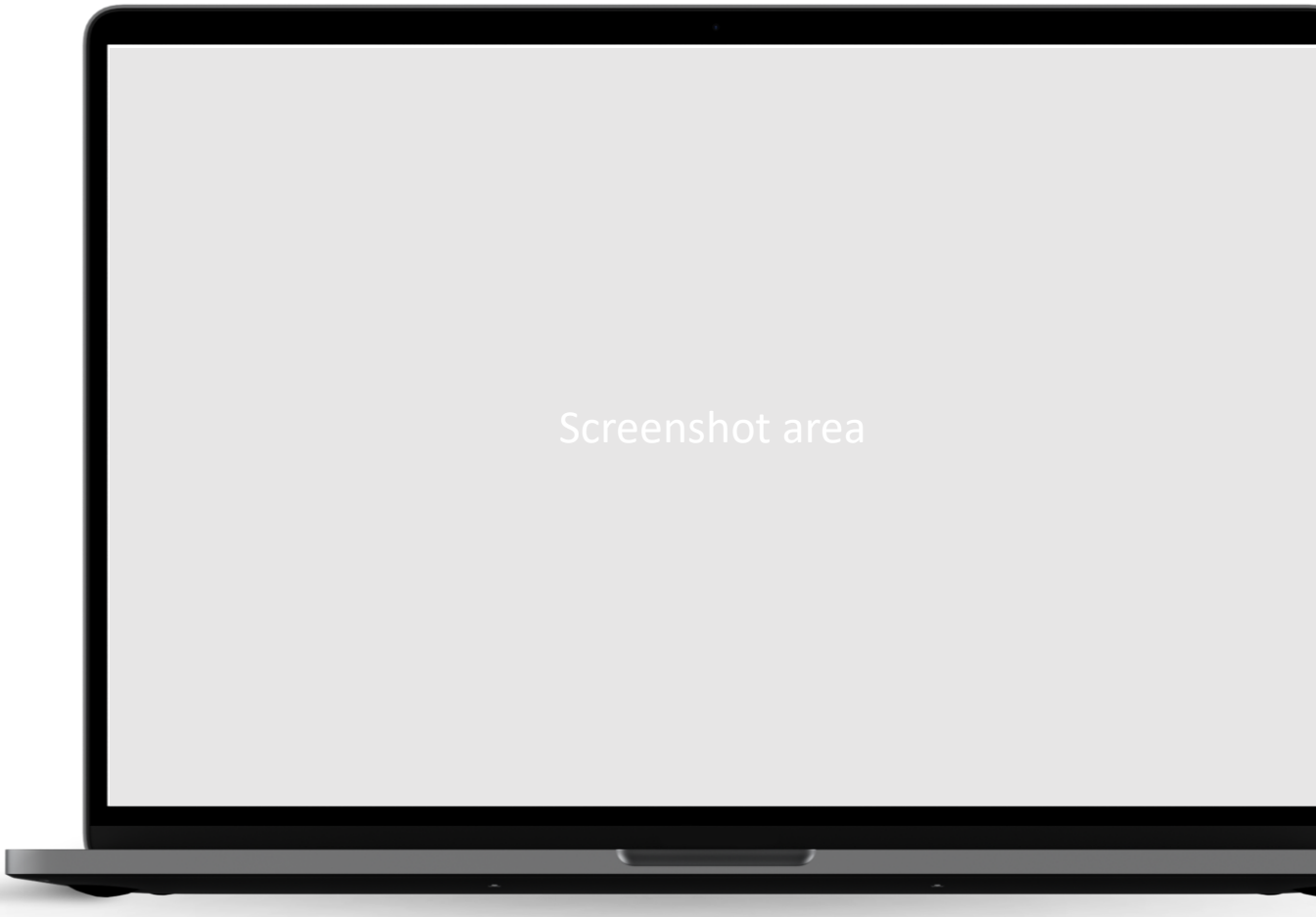

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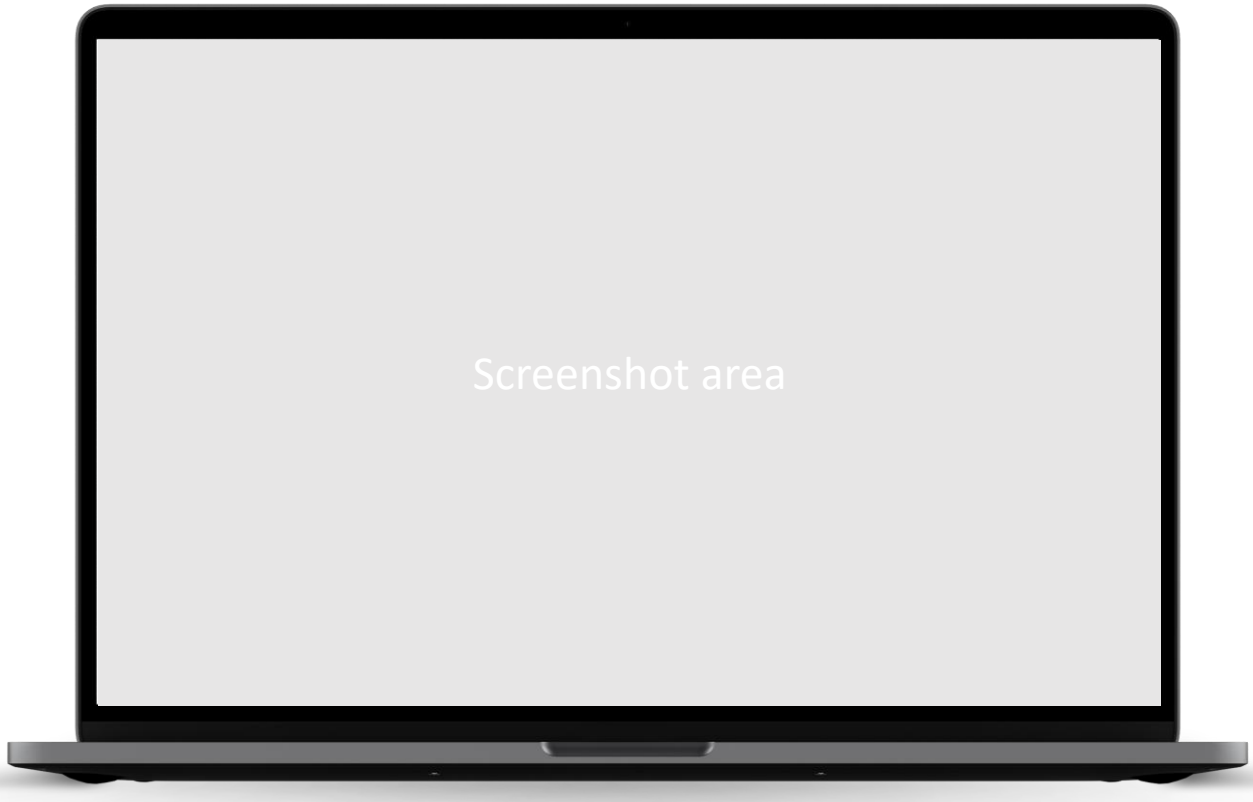

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Section One

ABOUT US

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Section One

WELCOME & *INTRODUCTIONS*

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