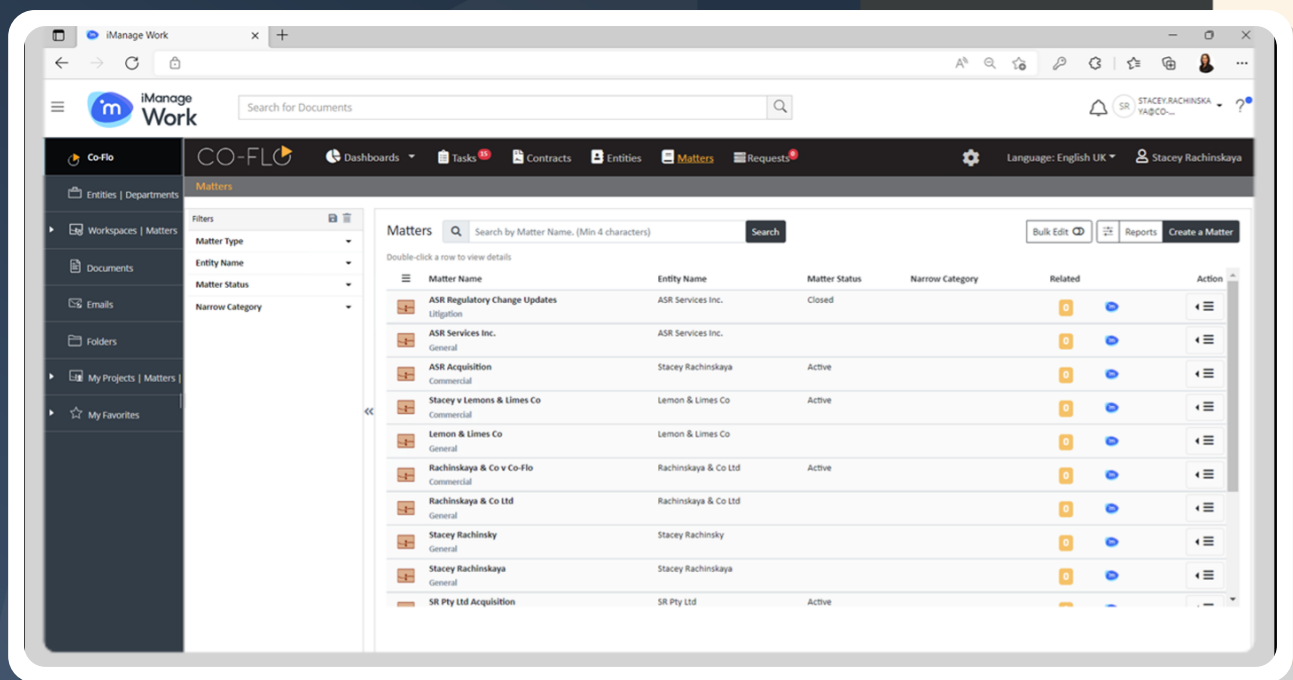


Case & Matter Management



Gain complete visibility over your work with Co-Flo Matter Management, a solution that extends and enhances iManage Work with matter management capabilities.

Key Benefits

Centralized Visibility

Reduce overwhelm by providing your legal team with a central source of truth for all matter statuses and details.

Effortless Linking to Organizational Structure

Co-Flo links work to your organization's structures including Legal Entities, OpCos and Business Units and Departments.

Priority & Risk Management

Ensure high-risk matters never go unnoticed, keeping them above the noise of day-to-day tasks to avoid missing crucial deadlines.

Streamlined LegalOps

Streamline legal operations with a matter management system that's natively embedded into iManage Work.

Efficient Collaboration

Foster collaboration and efficiency within your legal team by enabling smooth task and matter management handover.

Co-Flo empowers legal teams by reducing overwhelm, fostering easier collaboration and augmenting the value that your legal team brings to the business.

Simplify matter creation through configurable matter creation forms, using conditional logic and unlimited metadata recording capabilities. Gain centralized oversight, filterable listings and prioritization for critical deadlines. Connect matters to your organizational structure to reduce the risk of matters falling through the cracks as your business changes and evolves.

Streamline & Standardize Data Capture

Swiftly and easily create a matter directly within iManage Work. Co-Flo allows you to configure dynamic matter intake forms with unlimited metadata for each matter type. Conditional logic ensures that only relevant fields are presented based on previous responses, eliminating the need for users to click through unnecessary fields. Once a matter is created, Co-Flo immediately sets up an iManage workspace with your chosen standardized folder structure for the matter type, ensuring consistent and easy navigation across every workspace, every time.

Link Work to Your Organizational Structure

Co-Flo allows you to link each matter to a Business Unit, OpCo or Department to drive accountability and feedback to your internal customers. This contextualizes your work while reducing the risk of orphaned matters as organizational structures change. Co-Flo also maintains clear accountability by assigning matters to specific users, preventing tasks from being overlooked. Its bulk edit and reassign feature efficiently handles matter transfers during staff changes or absences, ensuring continuous management and oversight.

Improve Matter Oversight and Reporting

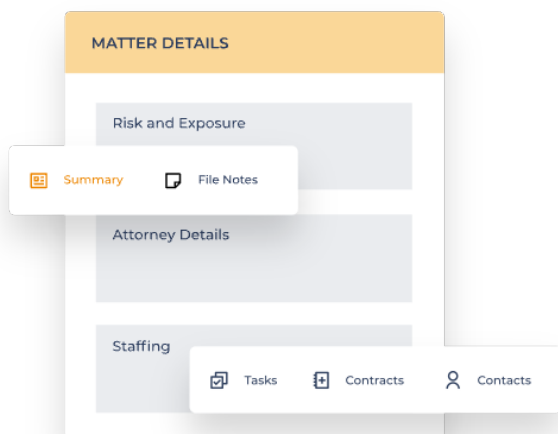
Rely on Co-Flo as a central source of truth for all work, accessed through a filterable and searchable matter listing screen. From the listing screen, view each matter's tasks, agreements, file notes and related matters to fully understand the context and connections of your caseload. Any changes to matter data are instantly reflected in iManage. All matters and required metadata can be exported as a PDF for internal and external auditors, or into a spreadsheet for compliance reporting, with archival support for regulatory retention rules.

Efficiently Manage and Track Key Priorities

Keep focused on the most critical work by adding priority and risk statuses to matters. High-risk matters are kept front and center in real-time Matter Dashboards, which sit directly within iManage. A single click takes you straight to the relevant iManage workspace.

Strengthen Matter Security

Co-Flo utilizes and automates iManage SPM security to ensure that highly sensitive matters are visible only to authorized users. This stringent approach to confidentiality means that critical information is accessible exclusively to those who need to work on them, safeguarding sensitive data effectively. Co-Flo supports multifactor authentication through integration with your Identity Provider (IDP), adding an extra layer of security to protect against unauthorized access.



CO-FLO



About Co-Flo

Co-Flo is a strategic iManage partner, delivering its cloud-native operations management suite for professional services firms and corporate service teams. Built by technology and operations experts, Co-Flo extends iManage into a multi-departmental solution, optimizing service delivery and team productivity across practice groups. Co-Flo ensures visibility and control over work-in-progress to improve timeliness, consistency and quality of knowledge work.

Visit www.co-flo.com to learn more.



About iManage

Dedicated to Making Knowledge Work™, iManage's cloud-native platform enables organizations to work more productively, collaboratively and securely. Employing award-winning AI-enabled technology, an extensive partner ecosystem and a customer-centric approach, iManage provides support and guidance you can trust to help you utilize knowledge to drive better business outcomes.

Visit www.imanage.com to learn more.

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