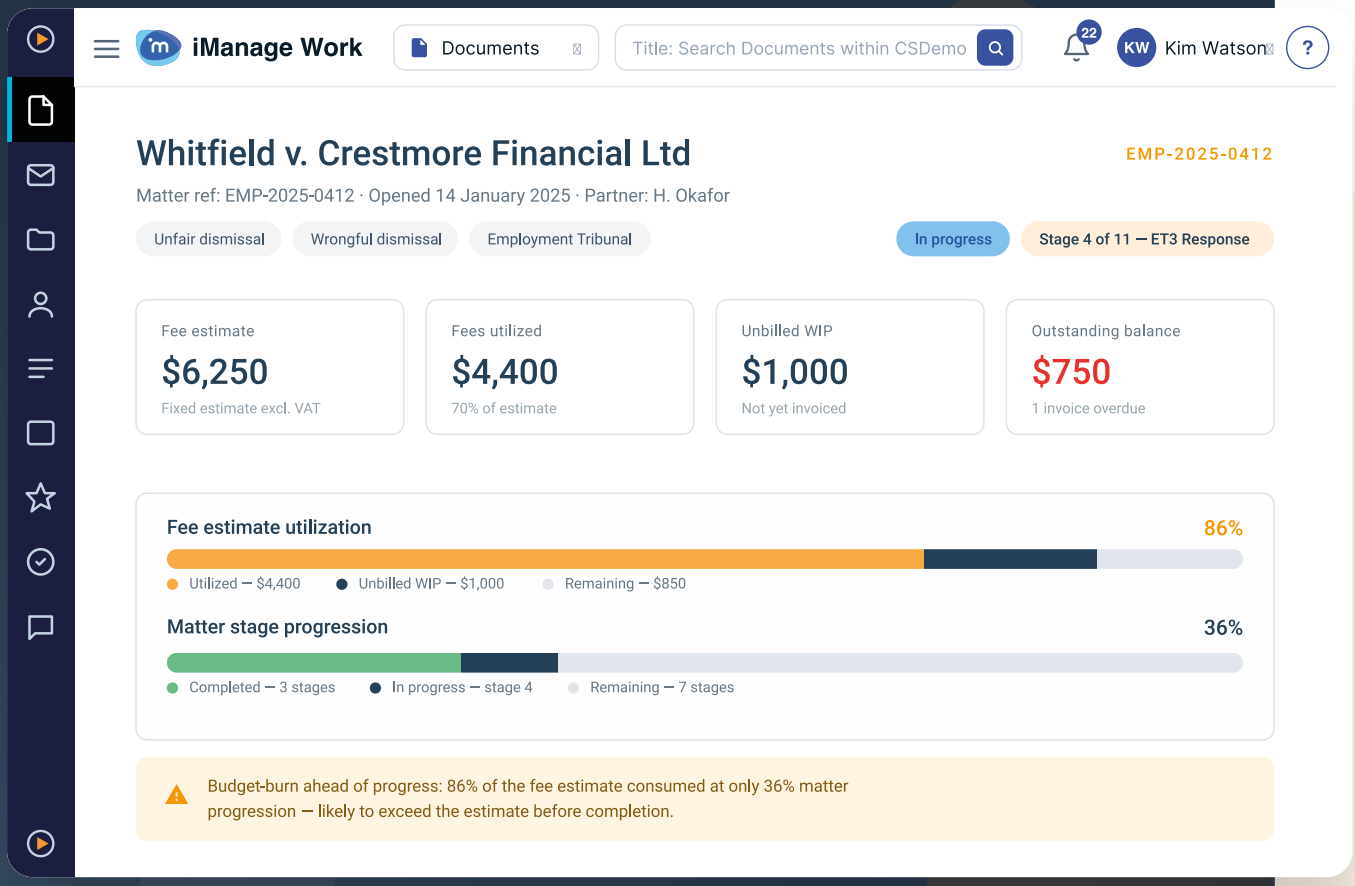
iManage | CO-FLO Solutions

SOLUTION DATASHEET

iManage | Co-Flo Solution for Law Firms



Big shifts in the legal landscape are forcing firms to change – but how?

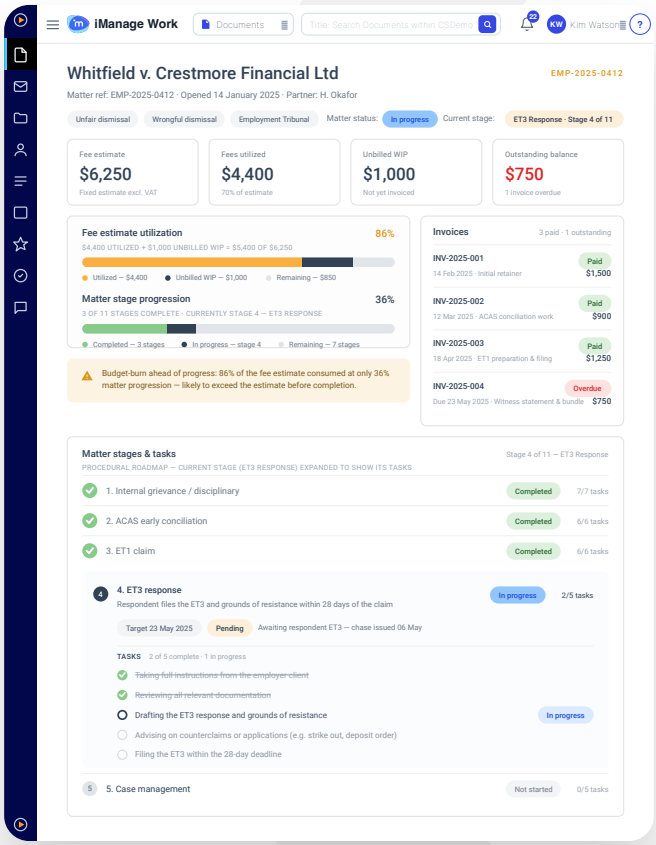
- **AI is bringing about productivity improvements, leading clients to request rate reductions and value-based AFAs.** You need to know and manage your costs effectively to maintain profitability in this new pricing regime. **But how?**
- **AI offers powerful benefits in specific applications but adds its own costs.** You need to measure the impact of this spending against real operational metrics and benefits to improve processes and drive costs down. **But how?**
- **Switching between billing, work-in-progress and document management systems quietly drains your team's time and blocks insights that lead to better decisions.** You want real-time visibility to matter financials, work plans and relevant content in one place. **But how?**
- **Law firm revenues increased (10% in the US last year) , but mid-size firms and larger firms using lower-cost staff and locations are capturing most of the growth due to lower rates.** You want to compete, but that would require the effective use of lower cost staff and automation. **But how?**

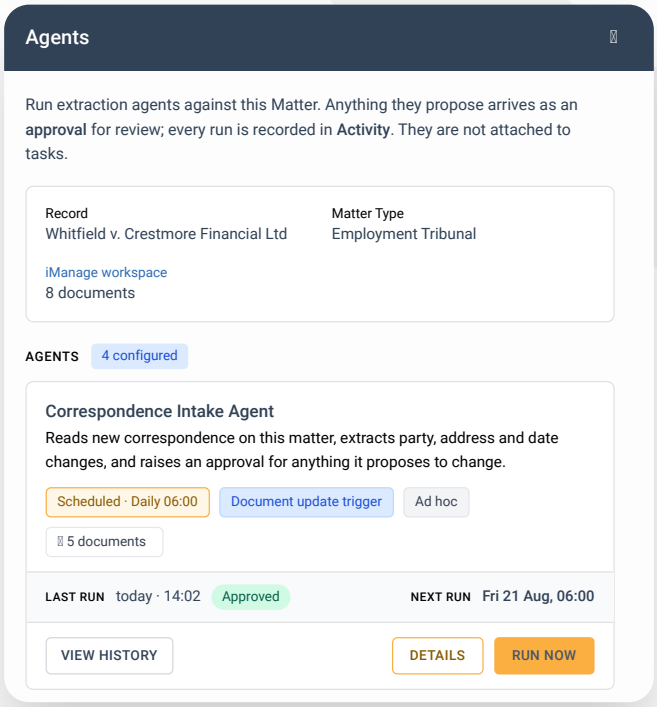
[1] 2026 Report on the State of the US Legal Market, Georgetown Law Center on Ethics and the Legal Profession and Thomson Reuters Institute

www.co-flo.com

Co-Flo Advanced Matter Management

AI agents, built into iManage, redefine how you Manage Work and maximize the Operational Efficiency of your practice





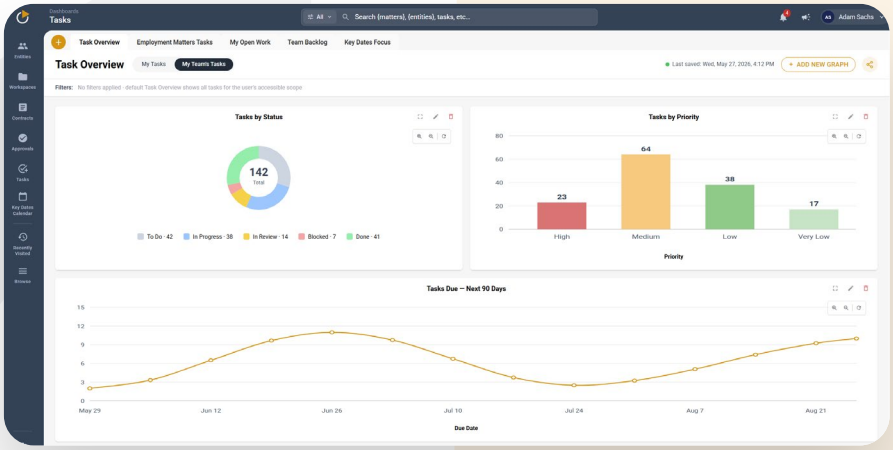
Co-Flo, an iManage strategic partner, has developed the first and only matter management system directly integrated with iManage and taking full advantage of all that iManage has to offer. Co-Flo extends and enriches iManage with proprietary operational metadata, process automation, key date management, PMS (financial data) integration and AI that improves matter profitability. It reduces write-offs, quantifies the impact of process improvements and AI agents, and provides real-time visibility into the status of all work in progress and the workloads of all staff.

The iManage | Co-Flo solution for Law Firms delivers powerful capabilities like:

- **Real-time visibility into all work:** Eliminate the need for status meetings and "where are we on X?" emails that waste time and pull staff away from billable work.
- **Operational metrics that help answer these key questions for all work:**
  - How much work is in progress?
  - What is the status of the work and what are the next actions?
  - Who is doing the work and is it optimally distributed?
  - Is work blocked or overdue?
  - What is the priority and risk in each matter?
  - Dashboards are linked to the underlying iManage workspace so moving from dashboard insights to action is just one click away.
- **On-time results delivered consistently:** Standardized matter-type specific playbooks empower all teams to deliver consistent complete results reducing risk of "fire drills" and ensuring compliance with firm best practices. Playbooks track stages and tasks, invoke AI agents and routing/approval workflows and manage key dates and deliverables, all as a single business flow, delivering practice level impact from AI.
- **Smarter staffing and service delivery decisions:** Identify staffing imbalances and reassign work in bulk as needed to ensure delivery. Shift workloads when team members are away or leave by easily reassigning matters or tasks.
- **Improved forecasts and profitability:** Operational metrics give you real-time data to:
  - **Reduce pre-bill write-offs and fee reductions:** Combining billing and work progression insights provides an estimate of Earned Value so you can proactively manage the issue before it becomes a billing problem.
  - **Spot roadblocks in processes:** Work more efficiently by reducing staff time spent chasing status updates and following up on next actions.
  - **Eliminate coordination meetings and emails:** Cut down on "work about work" to free up more time for billable work.
  - **Identify gaps in delivery:** Pinpoint the issues that cause costly overruns and use the data to effectively coach and train staff.
  - **Reduce "fire drills":** Address the omissions or missed dates that often cause them and drain profitability.

- **Test and validate new ways of working:** See the impact on operational metrics such as time to deliver, time in stage and cycle time, and quantify the impact of new AI tools to justify investment.
- **Reduce attorney stress:** Each attorney and staff member has a personal dashboard of all actions, key dates and matters assigned to them. This dashboard acts as a "single source of truth" for all actions assigned and their priority, eliminating the worry and need to scan email inboxes and Teams chat for requests and actions. Matter-centric dashboards remove the stress of searching for requests or tasks in email or Teams and help attorneys ensure nothing is missed.

Personal dashboards display each person's work list



- **Improve matter profitability and utilization delivery:** Dashboards flag work imbalances and staff overload, so work can be reassigned in bulk or in real time, speeding up delivery or shifting tasks to lower-cost resources when it makes sense.

Take Full Advantage of All that iManage has to Offer

All Co-Flo solutions are fully integrated into iManage Work 10, both on premises and in the iManage Cloud. Co-Flo's seamless integration into the iManage platform enables a single view into all work, contributing to faster user onboarding and greater user adoption. Co-Flo is co-hosted in the same Azure data centers as iManage for optimized performance and coordinated security and governance. The Co-Flo interface is embedded within the iManage interface your staff already use daily, which eliminates context switching and ensures optimal work efficiency.

Co-Flo extends iManage with key functionality and new applications



Co-Flo builds on the iManage matter-centric framework and iManage platform functionality

Co-Flo adds new operations metadata and reporting directly inside the iManage interface – improving adoption of iManage by making it an essential part of the attorney's own work management.

- **Full integration into the iManage user experience:** Increases adoption and reduces change management.
- **iManage and Co-Flo metadata combined:** Surfaces new insights by bringing the two data sets together.
- **Security Policy Manager:** Manages security across Co-Flo data and objects according to your organization's policies.
- **Full integration with iManage Tracker and MS Todo:** Co-Flo tasks and actions can appear in Outlook task lists.
- **AI agents analyze emails and metadata in iManage:** Co-Flo AI agents review all filed emails in iManage and update Co-Flo data, saving staff time and improving organizational agility. For example:
  - **Actions requested affecting work:** Requests like "stop all work on a given matter" (settlement) or "add a deliverable to the plan" are now detected and actioned as tasks in Co-Flo, with human review when needed.
  - **Date changes:** Detected automatically by AI agents, with the appropriate Co-Flo metadata updated.

With iManage | Co-Flo Solutions, you can collaborate in the same workspaces with other teams. Using iManage Security Policy Manager each group and individual sees only what they are permitted by policy. You get secure collaboration with enforced "need to know" security, all seamlessly integrated, making effective and secure cross departmental collaboration a practical reality. All Co-Flo solutions are fully integrated into (and require) iManage Work, the industry leading work management platform, trusted by 80% of the world's leading law firms and over 1,400 leading legal and compliance departments. Co-Flo's seamless integration into the iManage platform enables a single view into all work, contributing to faster user onboarding and greater user adoption.

iManage | CO-FLO Solutions

Take the next step

See all that iManage | Co-Flo Solutions can do for your organization:

REQUEST A DEMO

CHAT WITH AN EXPERT

About iManage

Dedicated to Making Knowledge Work™, iManage 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 leverage knowledge to drive better business outcomes.

Visit www.imanage.com to learn more.

About Co-Flo

Co-Flo is a strategic iManage partner, delivering a cloud-native matter and operations management solution for law firms and corporate legal teams. Built directly inside iManage, Co-Flo takes full advantage of iManage platform capabilities, including security and metadata, to extend and enrich iManage for Operations and Matter Management.

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