

## Enterprise Legal Management (ELM)

# Manage Matters

## Process Module for Law Firms



### Estimating, Budgeting, and Project Management

Law firms need the ability to manage matters at each step of a client engagement.

Law firms strive to quote accurate fees and monitor progress against expectations, to avoid project mismanagement, write-downs, and client dissatisfaction.

The Elevate ELM Manage Matters process module is a scalable solution focused on the matter lifecycle, helping you plan, monitor, collaborate, build a budget, track, and communicate with clients.

## Why Select Manage Matters from Elevate?

- Legal Industry Focus**  
Elevate focuses on a legal matter's lifecycle, not just the front-end pricing or the back-end reporting. Manage Matters is exclusively built for the legal industry.
- Manage Projects to a Budget and Timeline**  
Easily manage and compare client commitments and current status.
- Reduce Write Downs**  
Increase project matter status visibility for all matter participants. Email alerts ensure monitoring of all matter projects to identify issues prior to billing.
- Seamless Integration**  
No need for double entry, Manage Matters integrates into your financial management system.
- Tools to Assist**  
For matter pricing, planning, creation, monitoring, or reporting – Manage Matters has tools to assist and email reminders across different roles within a firm.
- Provide Transparency to Clients**  
A dedicated client portal provides automated updates, and high-level performance summaries.
- Gain Insights into Unmanaged Costs**  
With access to over 40 matter-level reports, a clear line of sight is available into all costs down to the individual line item.

# Manage Projects to a Budget and Timeline

**Know how many matters are critical, at-risk, and on track**

**Monitor performance against estimate and budget**

**Sort by column headings**

**Drill down into individual line items**

Matter Name	Matter#	Client Name	Budget Fee	Estimate Fee	Actual Fee	A/B %
Company A - purchase of refurbished ...	KM095451	Company A	6,000,000	-	4,265,261	71%
Company B Demo	-	Company B	70,000	34,900	0	0%
Company C - Matter Summ...	-	Company C	5,522,000	-	0	0%
UNDP: Legal Function Review	ELE3051	United Nations Development ...	206,100	0	0	0%
Rob Example	EOC155Elev	Elevate Consulting				
GS Example - with template applied to cl...	-	Company D				
Little Example	KM140144 - 2	Company E				
Example for Mike	-	Portfolio Example				
	-	Compendio				
	-	Portfolio Example				
	KM234455/02	Consulting Agency				
	KM234455 - 1	Firm F				
	KM125399/01	Firm G				

## Customer Impact

A leading law firm needs to preserve a vital client relationship by limiting write-offs and having a clear understanding of overall matter management. They work with Elevate to do legal project management utilising our Manage Matters module software.

Previous State	Impacts after Implementation of Manage Matters
Ran over budget 70% of the time.	<b>Write-offs Significantly Reduced:</b> Close to 80%.
Lack of communication led to significant write-offs for the firm.	<b>Process Simplification:</b> Cut the administrative time of the managing attorney by more than half.
There was little coordination across the law firm's global team.	<b>Improved Coordination:</b> The matter team received individual logins and utilised the automated alert system to stay on top of each matter during its complete lifecycle.
The client was displeased with over-runs and lack of communication.	<b>All Matters Now Tracked:</b> Matter leaders are tracking over 100 matters per year in Manage Matters.

## Results

Using Manage Matters was a success for this law firm; they subsequently won a seven-figure AFA from this now delighted client.