LegalTech
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LEGAL OPERATIONS: MATTER & LEGAL SPEND MANAGEMENT

BUYER'S GUIDE: 2021 EDITION

Xakia Legal Hub Streamlines Department Outcomes and Value

" Xakia provides visibility into legal operations and workloads, makes matter intake and triage consistent and transparent, manages legal spend and outside counsel assignments, and empowers data-driven decisions."

Company Name Brand
Xakia Technologies Inc.

Product Name Brand
Xakia

Latest Developments and Roadmap
- Enhanced existing functionality to collaborate with external resources (such as law firms)
- Salesforce integration to increase efficiency and unify data
- DocuSign CLM integration to facilitate a secure e-signature process

Comprehensive Matter Engagement
Xakia Technologies is an all-in-one platform born of the need for in-house counsel to manage and prioritize workloads, receive work, report to stakeholders, and demonstrate legal team value to the organization. Xakia provides visibility into legal operations and workloads, makes matter intake and triage consistent and transparent, manages legal spend and outside counsel assignments, and empowers data-driven decisions.

The platform is built around four key features: legal matter management, legal intake and triage, legal spend and external counsel management, and legal data analytics and reporting. The platform is API-driven to integrate with an organization's existing systems, including email, contract, and document management systems (DMS).

Legal Matter Management
Xakia's matter management provides workload visibility across your team, using tools to efficiently capture, track, and manage workflow. Xakia features a straightforward user interface with powerful database and workflow capabilities that are surfaced intuitively and as required to minimize visual noise for users and provide immediate, actionable insight into legal work. In Xakia, it is easy to search and find information quickly to analyze data for intake, matters, and litigation trends.

Matter management in Xakia is a broad concept, including contract management, dispute management, and document management where required. *See Figure 1.*
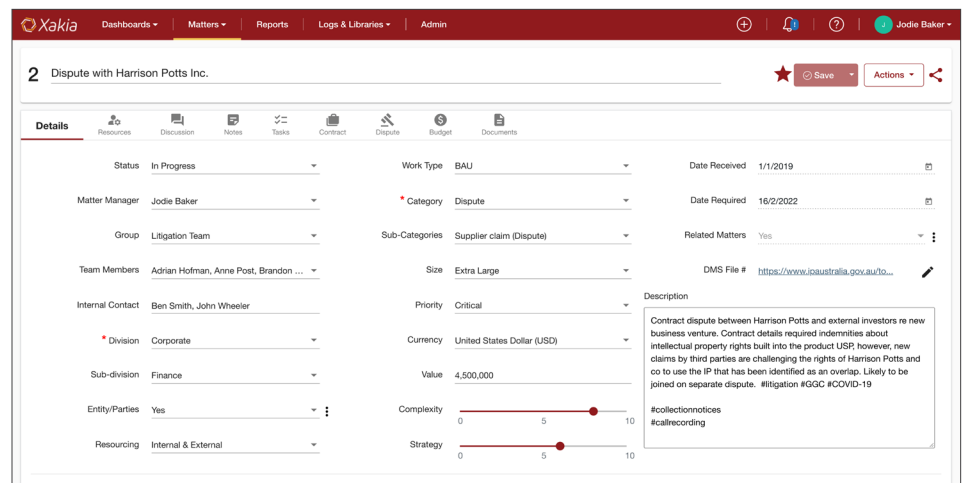

Figure 1: Xakia's user interface provides a tabbed view of matter details, resources, discussions, notes, tasks, contracts, disputes, budgets, and documents.

> **Xakia features a straightforward user interface with powerful database and workflow capabilities that are surfaced intuitively and as required to minimize visual noise for users and provide immediate, actionable insight into legal."**

> **Xakia's dashboards include visual graphics on all matters, contracts, disputes (litigation profiles), external resources, intake, and more. You can select various widgets in a dashboard to focus on categories, complexity, and matter size."**

The Matters List screen is a gateway to everyday actions to manage your workload and matter updates. You can edit a matter, add notes, and assign tasks in a slide-out panel, quickly collecting information that drives a matter forward, or needs to be automatically captured through to reporting. You can also view matters in Xakia's Card View and arrange them in columns organized by date, status, priority, and users for those who work in a more visual or agile style. Filter matters by various aspects such as category and hashtag, and drag and drop cards in data columns for easy tracking. *See Figure 2.*

There are several ways to capture matter information in Xakia, including via Outlook, Gmail, legal intake, templates, and through automation tools. The form to create a matter captures all necessary information of who is working on what and why and records qualitative measures such as matter complexity and the strategic value of work. These measures aid decisions about the proper resources to apply to a matter and whether work should go to junior or senior staff, internal resources, or an outside legal service provider.

As you create an individual matter, you can build family matters, link it to Xakia's built-in document management system, or integrate a third-party DMS (such as SharePoint, NetDocuments, or iManage). You have the option to set up custom fields for matters and display them on an intake form. To further simplify matter creation, set up templates to prefill information on a matter form.

The Dispute tab provides input for litigation management. Capture information on a claim, parties, finances, insurance, and multiple proceedings. Xakia analyzes and reports on the data, such as the likelihood of prevailing in litigation, and other trends.

Xakia supports approval workflows and maintains a post-signature database; however, it does not yet support pre-signature workflows and contract creation. The platform handles contracts differently than matters, using a separate database since contracts have many to one and one to many relationships with matters. And frequently, the legal department receives third-party hard-copy and completed agreements that only need recording and storage.

A contracts database reports extensive metadata for the organization, such as governing law, key clauses, currency, contract value, even hashtags. A new contract can simultaneously become part of a matter and contracts database or be linked to a document stored in the DMS.

Legal Intake and Triage
Legal intake processes in Xakia save the organization time and effort. The legal team can set up intake types, such as a contract approval or new employee request, and automatically route specific types to dedicated staff for triage and assignment.

Business users connect to Xakia to make and review legal requests in authenticated mode, supporting single sign-on (SSO) or unauthenticated mode via a secure link.
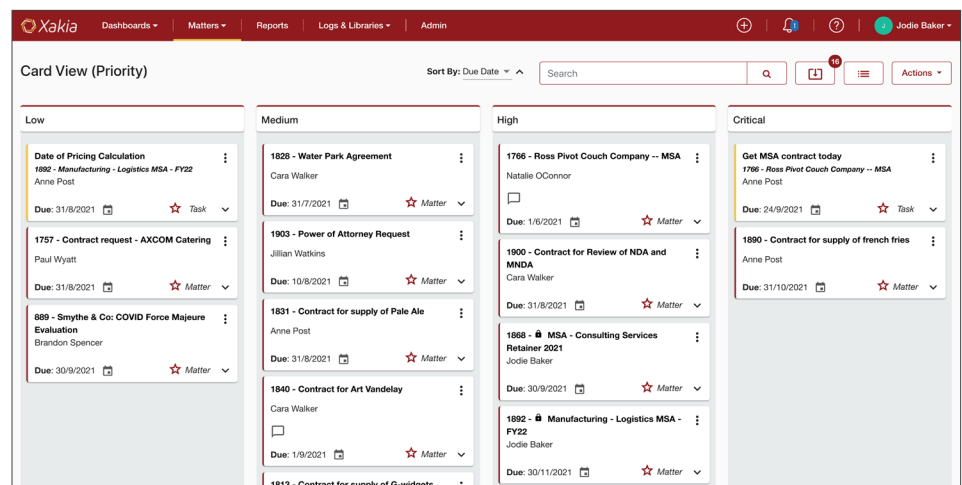

Figure 2: Xakia's Card View allows for visualization of your workload and can be managed from a single screen with drag & drop to add, assign, and complete tasks, and update due dates, status notes, and more.

Either way, users can view the status of pending requests and communicate with legal counsel throughout the journey of the matter.

Spend Management

Matter Resources provides the ability to collaborate with law firms and external service providers. The platform features tools to receive, review, and approve invoices for legal services, while recording and tracking matter and overall budgets. The legal department can invite law firms to access Xakia and enter invoices via a dedicated external portal. Xakia manages legal spending while maintaining simplicity and communication between parties. Although Xakia provides its own features to manage e-billing, it also integrates with specialist point solutions such as Brightflag.

Legal Data Analytics and Reporting

Legal departments produce notable work for organizations but often lack the resources to demonstrate it or make data-driven decisions on the basis of work demands. With Xakia, you can fully understand work profiles, make informed decisions on new work submissions, and deliver informative reports to stakeholders.

Xakia's dashboards include visual graphics on all matters, contracts, disputes (litigation profiles), external resources, intake, and more. You can select various widgets in a dashboard to focus on categories, complexity, and matter size. You can also view the complexity and strategic value of work to analyze resource expenditures. This analysis helps identify where complex cases may require more resources to succeed and where there are opportunities to optimize resources on non-complex cases of little strategic value, for example, by identifying opportunities for automation. *See Figure 3.*

The 29 standard reports available in Xakia show how the legal team supports their operations and highlight areas that need additional resources to improve results. You can easily view concise matter lists with metadata, matter descriptions, and status updates. You can also filter on various categories of work or work done for a specific division or group within the organization.

Deployment and Integration

Xakia runs in the Microsoft Azure cloud and maintains an ISO 27001 security certification. The company deploys Xakia's legal hub in a multitenancy architecture using the platform's all-in-one tools or

integrating third-party software—all in less than one hour. Bespoke integrations and data migration require more time, but Xakia measures it by hours and days, not weeks and months.

The Microsoft Outlook add-in and Gmail extension offer an alternate path to create and manage matters from email. Other integrations include SharePoint, Active Directory, and Okta identity and access management.

The platform supports user access permissions and locations for global operations with varying data security and regional storage requirements. An audit function reports all system transactions.

Pricing

The platform scales up or down for per-user per-month licensing, with flexible payment options using a credit card or invoice. Pricing starts at $55 USD per user per month for Matter Management, Dashboards and Reports, and Legal Hub and Integrations. Add Legal Intake and Triage along with Spend Management for $70 USD per user per month. Get all Xakia features for $90 USD per user per month. Bulk discounts are available for 50 or more users.

Who is Xakia?

Since 2016, Xakia Technologies has provided visibility into productivity and

simplified managing and reporting matters for legal operations of two to 200 staff members in global organizations. The predominantly woman-led company is privately owned and operated out of Melbourne, Australia, and Kansas City, Missouri. It has more than 25 employees in Australia, Canada, and the US, and channel partners in Canada, Hungary, Japan, Singapore, and the UK. Xakia supports all industry verticals and is used across five continents, offering the platform in eight languages.

Why Consider Xakia?

- Xakia deploys quickly (<1 hour) to optimize legal operations in matter management, legal spending, intake, and reporting
- Dynamic, customized forms and templates prepopulate data for recurring matters
- Integration with Microsoft Azure, Active Directory, Outlook, Gmail, SharePoint, and others, and API support to integrate third-party legal software with the platform
- Data analysis and reporting support data-driven decision making and inform stakeholders of legal operations' value

See it for Yourself!

Watch a 4-min Xakia demo video to see how it can optimize the efficiency of your legal department in < 1 hour.
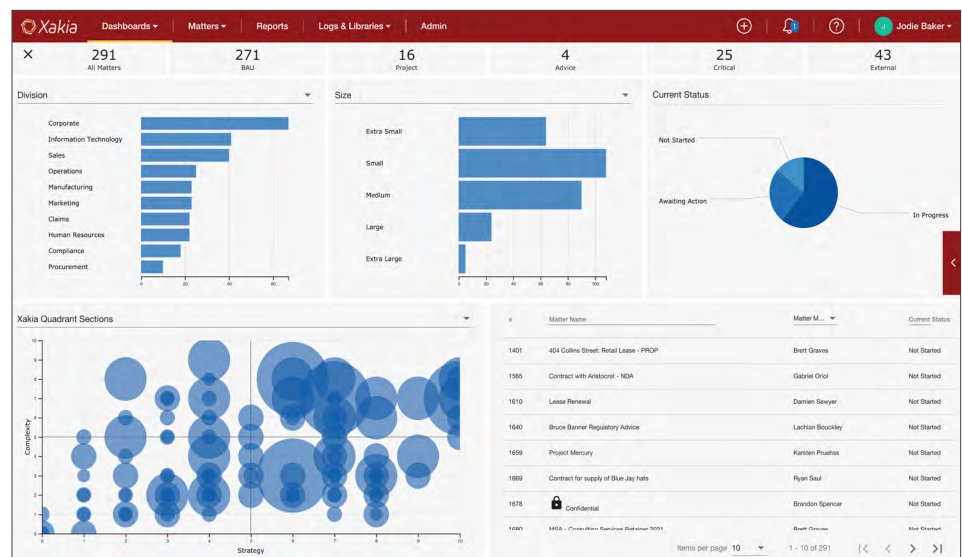

Figure 3: Xakia provides interactive, configurable dashboards to understand the composition of legal work, to demonstrate the strategic value of work, and to inform decision making for operational efficiencies.

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