

# Counsel Exchange

Modernize how legal teams and vendors work together

Counsel Exchange is a vendor collaboration and engagement layer that connects legal teams with outside counsel in a single, unified experience. It replaces fragmented workflows across email, legacy portals, and manual coordination with a structured, scalable system for managing invoices, budgets, matters, timekeepers, and communication.

By centralizing vendor interactions in one platform, Counsel Exchange reduces administrative overhead, improves visibility, and creates a more consistent and efficient way to manage vendor relationships across the lifecycle of legal work.

## Core Capabilities

**Invoice Submission and Tracking** Submit invoices through LEDES upload, PDF upload, or manual entry, with end-to-end status visibility. Support for invoice editing, resubmission, and clearer error messaging improves submission quality and reduces rework.

**Matter Visibility** Access assigned matters, including key identifiers, descriptions, and related invoice context, enabling better alignment between vendors and legal teams.

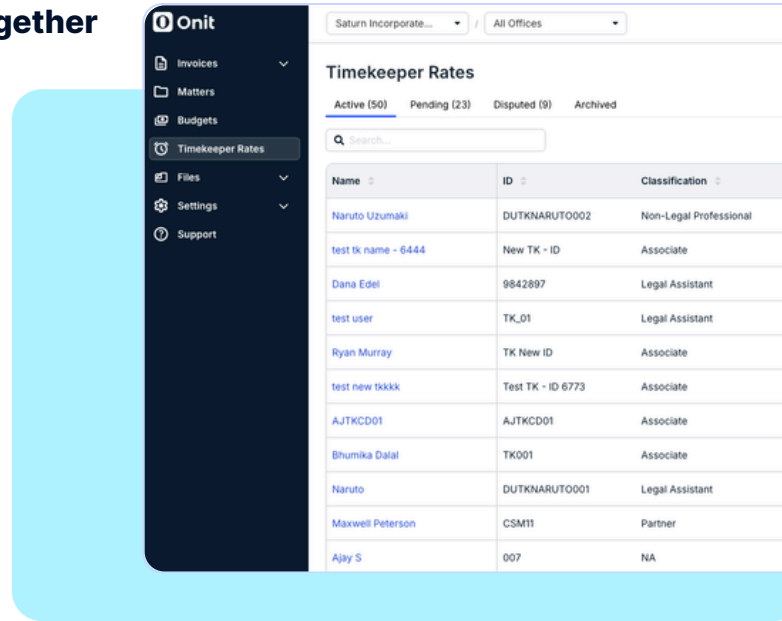
**Budget Collaboration** Collaborate on matter budgets within the system, aligning on scope, assumptions, and cost expectations before work begins, with visibility during invoice creation.

**Timekeeper Management** Add and manage timekeepers, submit rates for approval, and maintain timekeeper data with improved centralization and administrative controls.

**Notifications and Status Visibility** Provide real-time updates, validation and feedback, so vendors and legal teams stay aligned without manual follow-up.

**Vendor Self-Service and Support** Give vendors access to self-help resources, workflow guidance, and support tools to reduce dependency on internal legal teams.

**RFP Participation (When Enabled)** Allow vendors to view and participate in RFP workflows through the same portal experience when enabled by clients.



## Why Counsel Exchange?

### Streamline vendor collaboration across workflows

Give vendors one place to submit invoices, manage budgets, update timekeepers, and stay aligned on matters, reducing friction across core legal processes.

### Reduce administrative burden on legal teams

Minimize status inquiries, manual follow-up, and coordination by enabling vendor self-service and real-time visibility into workflow progress.

### Modernize the vendor experience

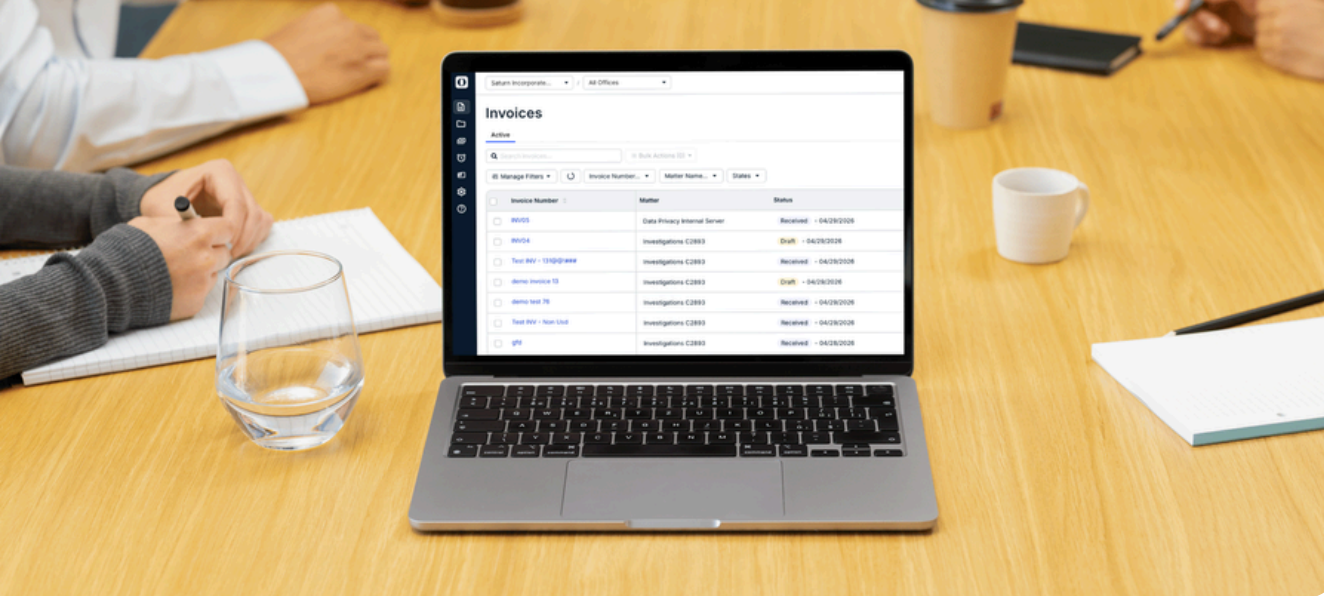
Deliver a more intuitive interface with streamlined navigation, one login across multiple clients, and a more consistent user experience.

### Improve control and visibility

Strengthen governance with role-based permissions, budget visibility, file sharing, and clearer insight into invoice status and workflow activity.

### Support scalable vendor operations

Create a repeatable, centralized way to manage vendor relationships without increasing operational overhead.



## How Legal Teams Use Counsel Exchange

**Reduce invoice status inquiries** Vendors submit and track invoices directly, reducing back-and-forth communication and freeing up internal teams.

**Collaborate on budgets before work begins** Legal teams and vendors align on cost expectations early, improving predictability and reducing surprises.

**Centralize timekeeper management** Vendors maintain accurate timekeeper data and rates in one place, improving consistency and reducing manual effort.

**Scale vendor collaboration across firms** A unified portal with one login enables vendors to work across multiple clients with a consistent experience.

**Modernize legacy vendor workflows** Replace fragmented systems with a more intuitive, centralized platform while maintaining continuity for critical workflows.



## What Makes Counsel Exchange Different

1

### Purpose-built for vendor collaboration

Designed to support ongoing engagement with existing vendors, not vendor sourcing or procurement.

2

### Unified vendor experience

One login, consistent workflows, and a scalable platform for managing vendor relationships across clients.

3

### Balanced vendor self-service and control

Vendors gain autonomy while legal teams maintain governance and visibility across workflows.

4

### Modernization without disruption

Supports a transition from legacy systems or manual process while preserving core workflows.

Ready to experience the future of legal efficiency?



SEE COUNSEL EXCHANGE IN ACTION