

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.

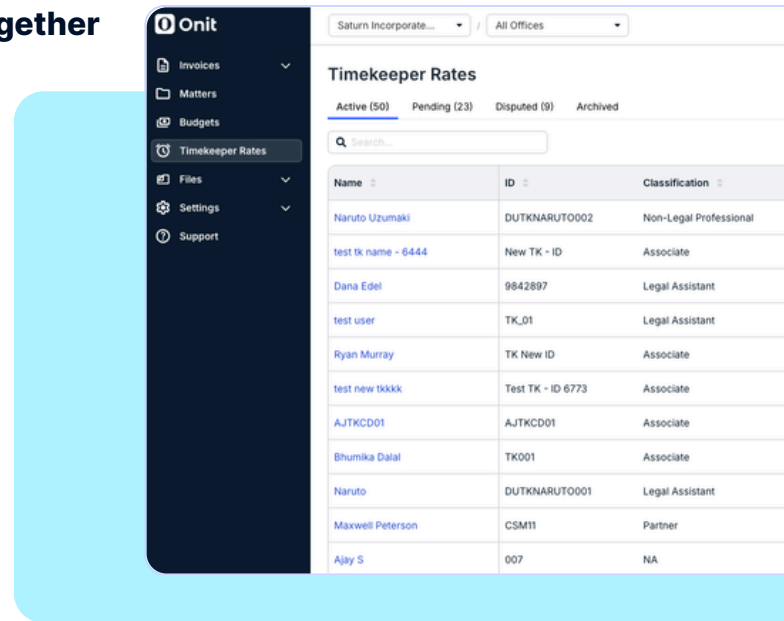
User Administration and Role-Based Access Enable vendors to manage users, assign roles, and control access with client-specific permissions and role-based controls.

File Sharing and Updates Share documents and collaborate across vendor/client, matter, and invoice levels, with centralized communication and workflow context.

Notifications and Status Visibility Provide real-time updates, validation and customizable notifications 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

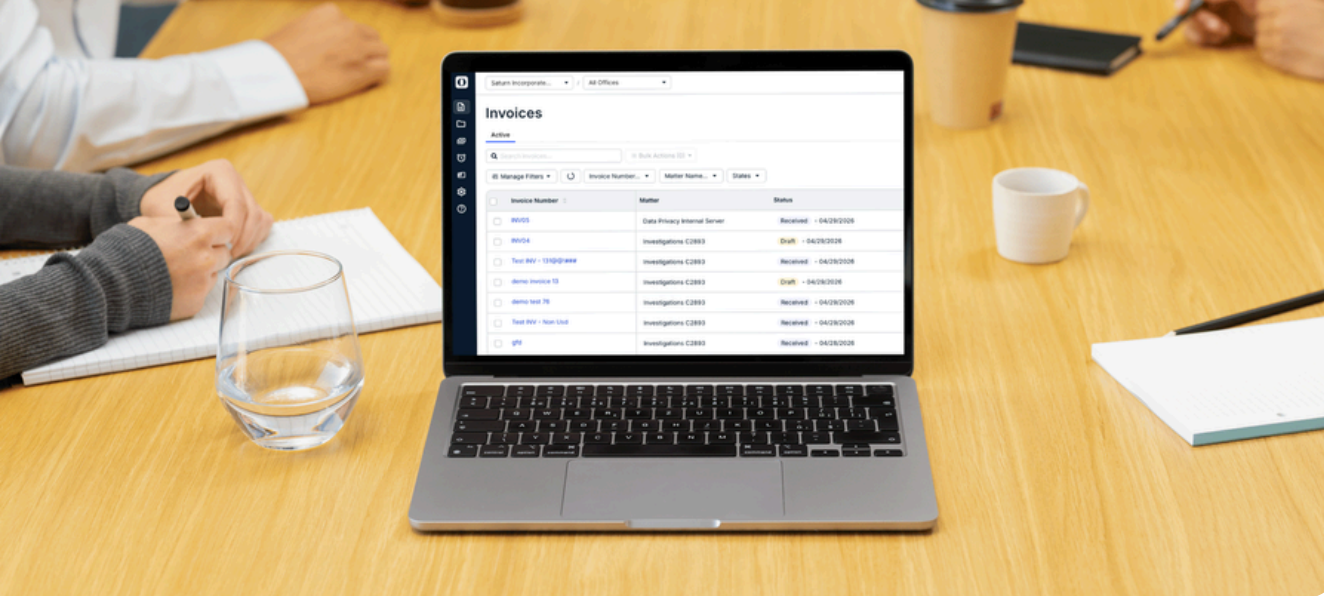
Deliver a more intuitive interface with streamlined navigation, one login across multiple clients, and a more consistent user experience.

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