

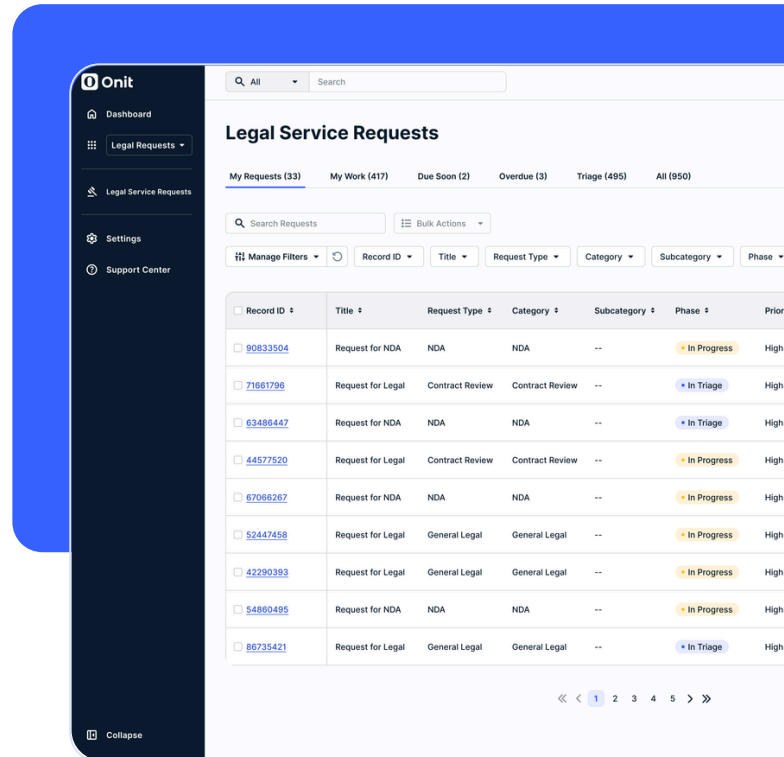
Unity LSR

A smarter legal front door for faster intake, answers, and triage

Legal teams are under pressure to respond faster, reduce administrative burden, and give the business a clearer path to legal support. But requests often arrive through scattered emails, chat messages, incomplete forms, and informal side channels. The result is delayed work, repeated follow-up, limited visibility, and too much time spent sorting out what the business actually needs.

Unity Legal Service Requests (LSR) brings structure, intelligence, and control to legal intake. With an AI-guided experience, business users can describe what they need in plain language, get help with common policy and process questions using approved company knowledge, or be guided into a structured request when Legal needs to take action. The result is a better experience for the business and a more efficient intake process for Legal. Business users get clearer next steps. Legal receives better information from the start. Legal Ops gains visibility into submitted requests, AI-completed interactions, ownership, status, and outcomes across the intake lifecycle.

Built for the Unity suite, it helps legal teams modernize intake without adding operational complexity. Teams can reduce avoidable requests, improve submission quality, preserve oversight, and keep legal work moving from first touch through triage, resolution, or matter creation.



Core Capabilities

AI-Guided Legal Front Door
Give business users a more intuitive way to engage Legal. Unity LSR helps users describe what they need, determine the appropriate path, and move forward through self-service guidance or structured request creation.

Knowledge-Based Responses with Citations
Help business users get faster answers to common policy and process questions using approved company knowledge. Unity LSR can reference customer-managed documents and provide source information where available.

Guided Legal Request Creation
When a question needs Legal's attention, Unity LSR guides the user through request creation and captures the details needed for triage. This helps reduce back-and-forth and gives Legal better context from the start.

Controlled Escalation to Legal
When approved knowledge is not enough to support a confident response, Unity LSR asks follow-up questions or moves the user into a structured legal service request. Legal stays in control of ambiguous, incomplete, or higher-risk work.

Complete Request Record
Capture AI-completed interactions and submitted requests, including the conversation transcript, source information where available, request details, comments, history, and status.

Matter Creation from LSR
When an LSR requires more formal matter management, Legal can create a matter directly from the request, carry over key fields, and preserve links between the request and resulting matter.

Role-Based Visibility and Request Status
Give Legal teams and business users visibility into request status, ownership, and next steps. Centralized records help reduce manual follow-up and keep stakeholders aligned.

Customer-Managed Knowledge Library
Enable teams to upload approved knowledge documents that Unity LSR can reference when answering common policy and process questions. Teams stay in control of the source material Unity LSR can use.



Why Unity LSR?

Reduce avoidable legal intake: Help business users resolve routine policy and process questions before they become unnecessary legal requests.

Improve request quality from the start:

Capture clearer, more complete information before work reaches Legal, reducing manual follow-up and accelerating triage.

Give the business a better legal experience:

Provide one place to ask questions, submit requests, and track status, so business users know where to go and what happens next.

Help Legal focus on higher-value work:

Reduce time spent on repetitive questions, intake cleanup, and status updates so Legal can focus on work that requires judgment and expertise.

Increase visibility into legal demand: Give Legal a centralized view of submitted requests, AI-completed interactions, transcripts, status, and ownership so teams can better manage intake and follow-up.

Preserve control while improving speed:

Support faster intake and self-service guidance while moving unresolved or higher-risk issues into Legal review.

What Makes Unity LSR Different

1. A better starting point for the business

Business users can begin with a guided experience instead of guessing which form to use or where to send a request.

2. Faster answers from approved knowledge

Unity LSR helps respond to common policy and process questions using customer-managed content, so guidance stays aligned with internal documentation.

3. Practical guardrails for legal work

Unity LSR does not try to answer every question. When available sources are not enough, or when the matter needs Legal involvement, the request moves to Legal.

4. Self-service and intake in one experience

The same front door supports common question handling and structured legal request creation, reducing fragmentation across email, chat, and forms.

5. Connected intake and matter management

Legal teams can move from request intake to matter creation when the scope of work requires it, helping preserve continuity from first request to ongoing management.

6. Built for Legal Ops control

AI-completed interactions and submitted requests can be captured with the visibility, auditability, and workflow structure Legal needs to manage demand at scale.



How Unity LSR Works

1. Business users start with a guided experience

A business user opens Unity LSR and describes what they need in plain language. The traditional LSR request form remains available for users who prefer to submit directly.

2. Unity LSR checks approved company knowledge

Unity LSR looks for relevant information in customer-managed knowledge documents that have been uploaded into the knowledge base.

3. The user gets an answer or a follow-up question

If the answer is supported by available knowledge, Unity LSR provides a concise response with source information where available. If more context is needed, it asks targeted follow-up questions.

4. Requests that need Legal move into intake

If the request cannot be answered from approved knowledge or requires Legal involvement, Unity LSR guides the user through request creation and captures structured intake details.

5. Legal receives better context

Unity LSR creates a request record with relevant intake information, transcript, and context so Legal can triage and assign work more efficiently.

6. Larger requests can become matters

When a request requires more formal matter management, Legal can create a matter from the LSR and maintain a connection between the original request and the resulting matter.

7. Stakeholders track progress

Legal teams manage ownership, status, comments, and request history in a centralized workspace. Business users can track request status without sending follow-up emails.

How Legal Teams Use Unity LSR

Answer routine questions faster: Give business users a faster way to get answers to common policy and process questions grounded in approved company knowledge.

Reduce intake cleanup: Guide users through the right questions so Legal receives more complete requests with less manual follow-up.

Move the right work into legal triage: When a question cannot be answered from approved knowledge or needs Legal involvement, Unity LSR guides the user into a structured request for the triage team.

Create matters from requests when needed: Convert an LSR into a matter when the work requires more formal matter management, while preserving the connection between intake and ongoing legal work.

Centralize context and collaboration: Keep comments, status updates, chat history, and request details connected to the request record.

Improve operational visibility: Review submitted requests, AI-completed interactions, transcripts, status, ownership, and supporting context in one centralized system.



Ready to modernize legal intake with Unity LSR?

SEE UNITY LSR IN ACTION