

Key Dates

Who is this for

We designed this service to help global law firms simplify how they capture and manage key dates. It will help you improve your compliance and service delivery and reduce the number of PI claims you make.

How this service can help you

Many matters have key dates you need to adhere to, such as court hearings, document submission targets and operational deadlines. If you were to miss one of these dates it would have significant implications for your client care and professional liability. So it's vital your matter teams are aware of all your key dates, in particular in litigation cases.

We designed our key dates service to capture your deliverables and their dates, both when you open a matter and while you maintain it. All the data is captured and managed on the Intapp Flow and Open platforms.

Once you've created the matter in your finance management system, your matter teams' Outlook calendars will be automatically populated with the dates that are relevant to them. Whenever anyone joins or leaves a matter team their calendars will also be updated.

You'll be able to create management reports across the data so your department heads, risk and practice managers can see all the risks and liabilities.

What we do

Our key dates projects usually take a few days.

We will:

- ▲ Plug in our own preconfigured key dates forms, workflow and extension tables. This will allow you to immediately capture and maintain your key dates and integrate them into Outlook.
- ▲ Put in place management forms and workflows that your administrators can configure to suit the specific needs of your firm and each piece of business.
- ▲ If you need, work with you to identify how we can build the functionality into the matter inception process.
- ▲ Work with you to identify your reporting needs, advise you on reporting formats and tailor your reports to suit.

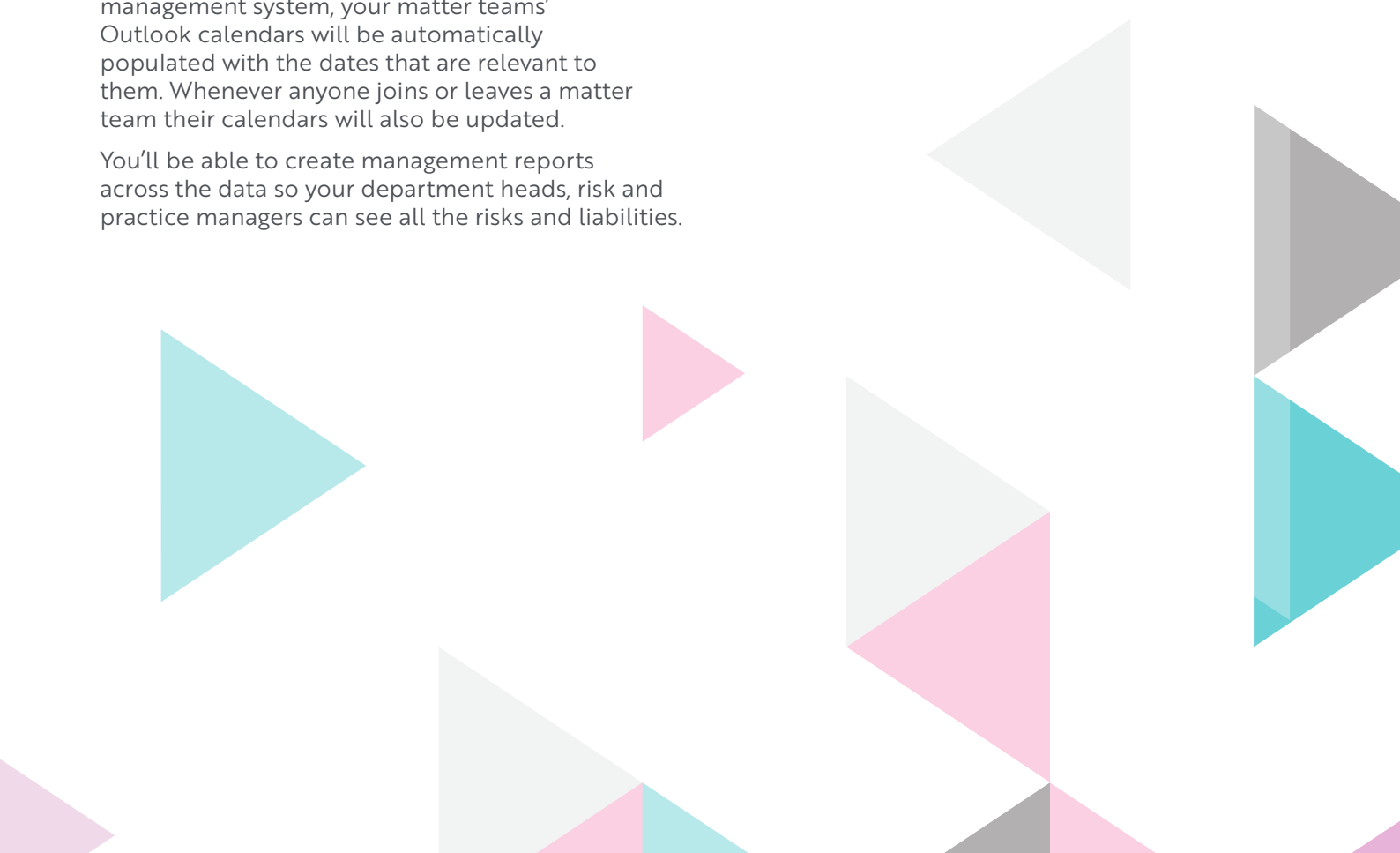


Fig 1. Key date grid. Details get written to Outlook. Also written to the database so they can be recalled and edited.

Fig 2. Customisable list of event types.

Name	
Administrator	✎ ✕
TB Services	✎ ✕
Cobra Admin (Elite SVC)	✎ ✕

Fig 3. Reminders and events get sent to users added to the matter grid.

The difference this makes to you

- Your service delivery will improve and you'll have fewer PI claims as a result of missed deadlines
- You'll enjoy a fast, intelligent, automatic process
- You'll be able to easily use your data to trigger reminders
- You can be sure your matter team members will automatically be made aware of relevant matter deadlines
- You'll have a central store of data you can use to highlight and report on your firm's exposure to risk
- You'll be able to run and manage the system in-house

The software you need:

- Intapp Open or Intapp Flow; MS Exchange; SSRS or Power BI

For more information please email James Bruford:
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Can we help you?

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