LexMundi Equisphere

Knowledge Packs for
More Successful Matter Outcomes

Matter
Management Module

LexMundi
World Ready

MATTER-MANAGEMENT BOARDS

What are they and how can they help me better manage my work?

Video 8: Using a Board to Manage WIP of a Practice Group

GIMBAL
LEAN PRACTICE MANAGEMENT ADVISORS

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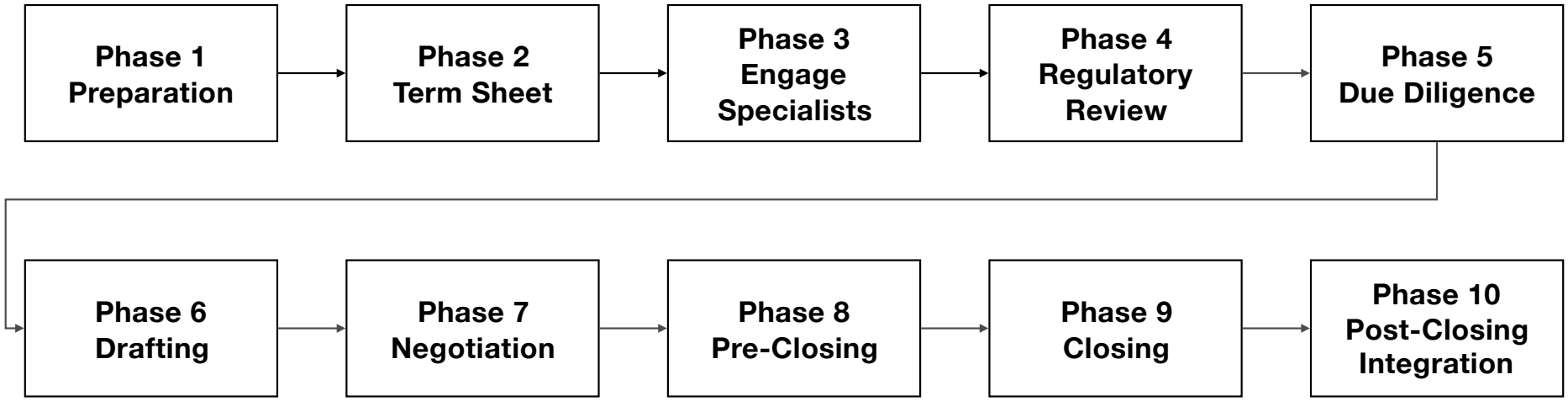
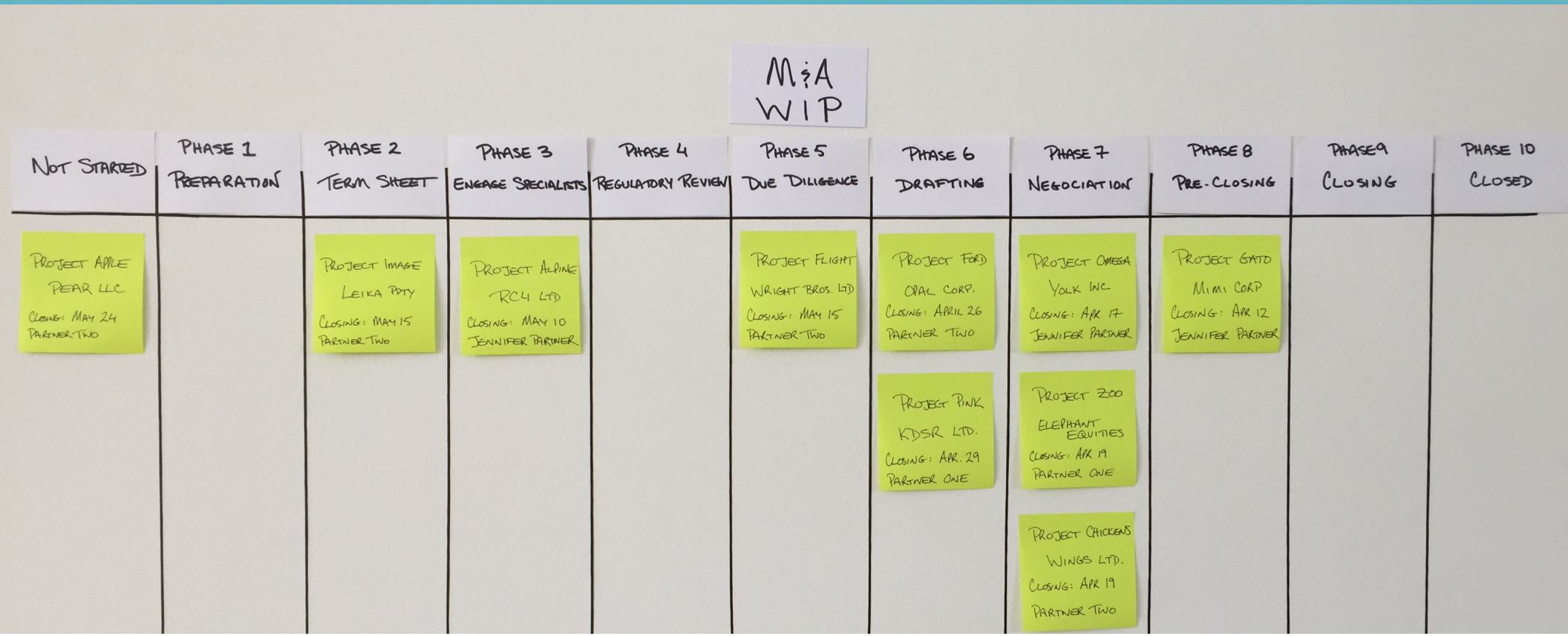
Phases of an M&A Transaction

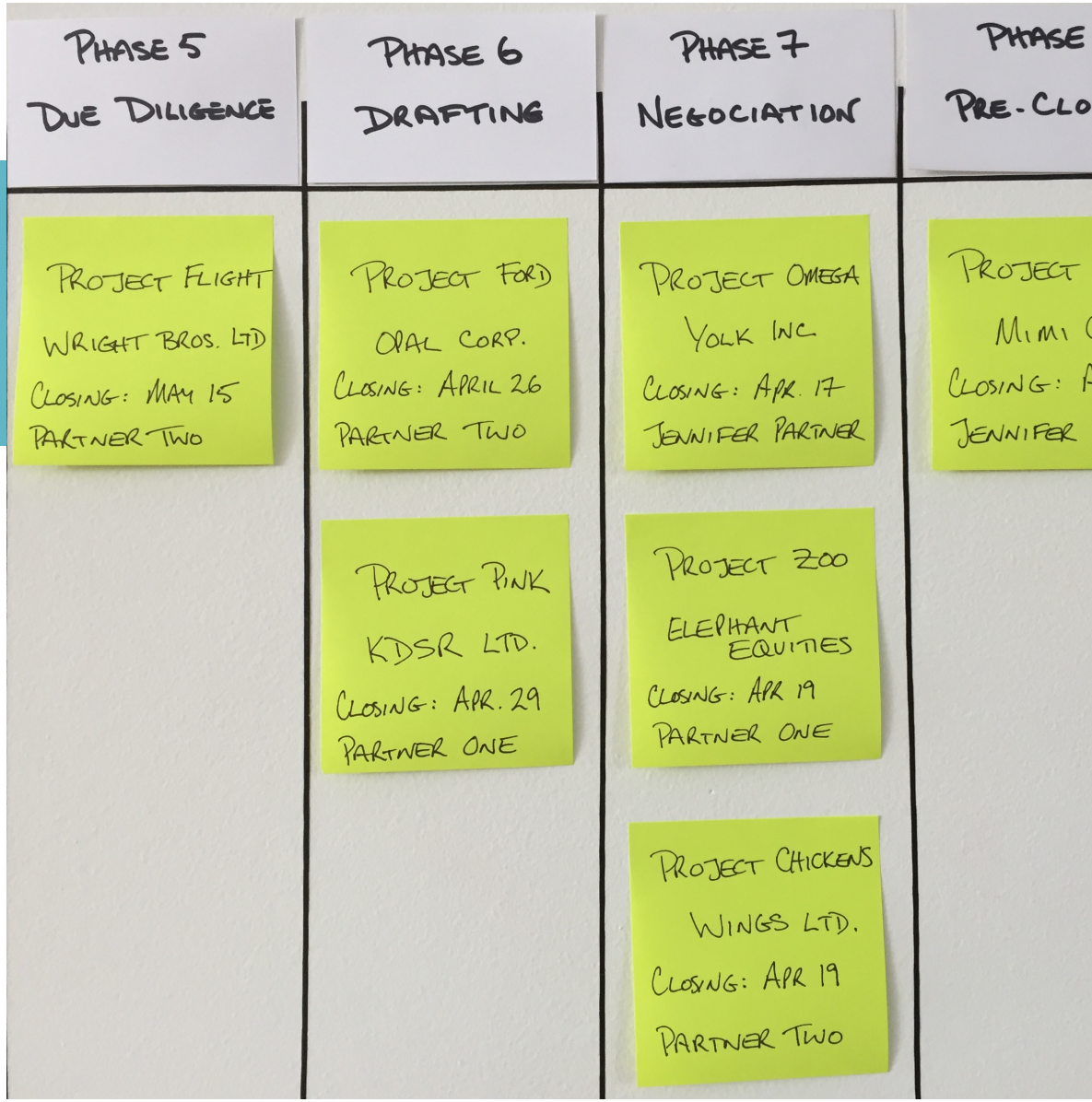


Work in Progress



What Information to Capture

- Project name
- Client
- Closing date
- Supervising Partner
- What else?

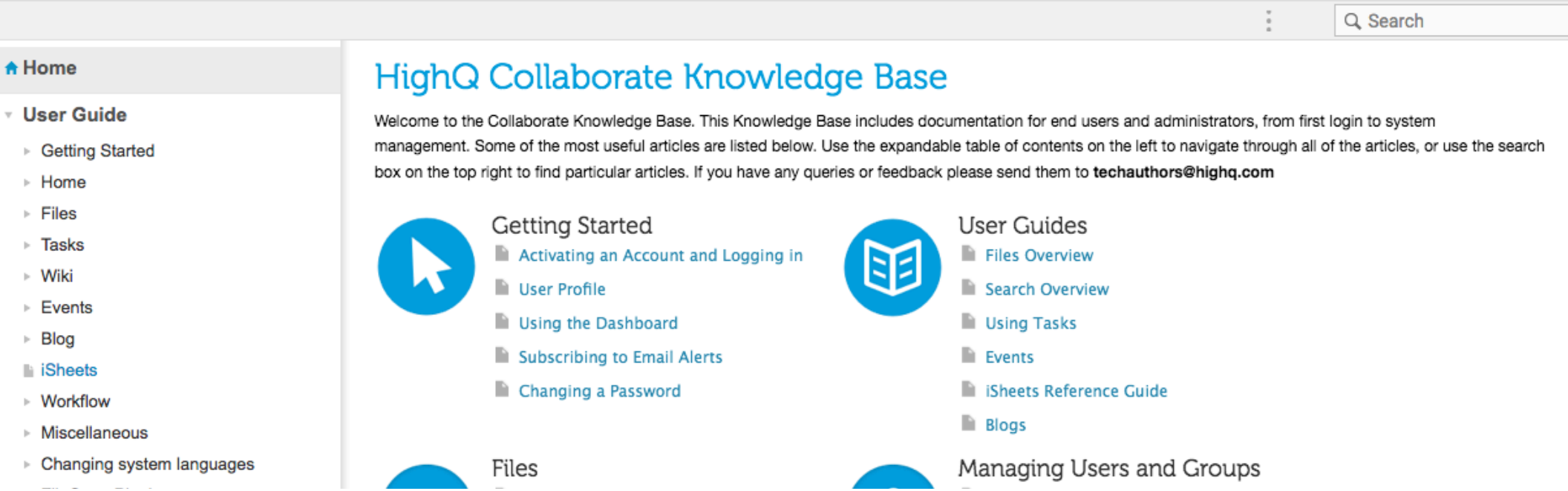


HighQ's Knowledge Base

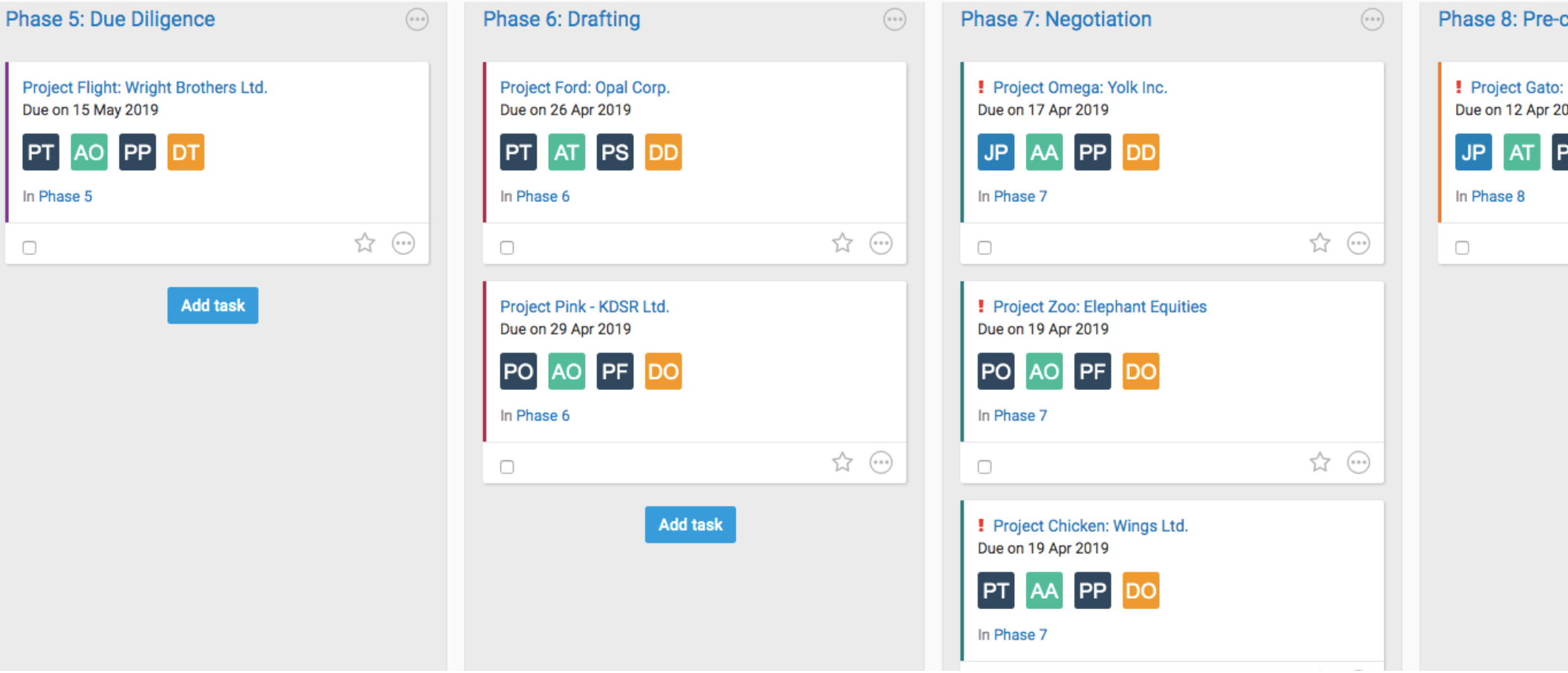
HighQ

Home Knowledge Base

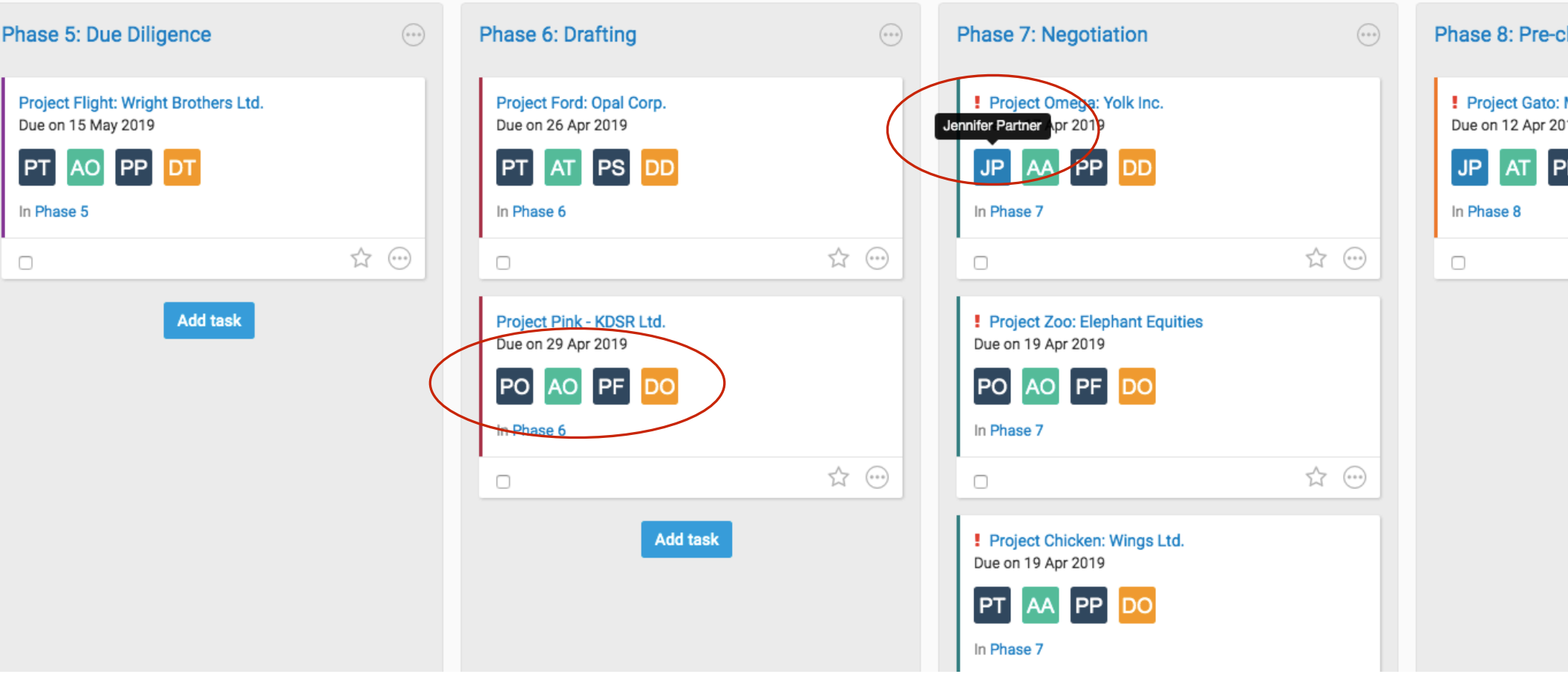
www. kb-collaborate.highq.com/home



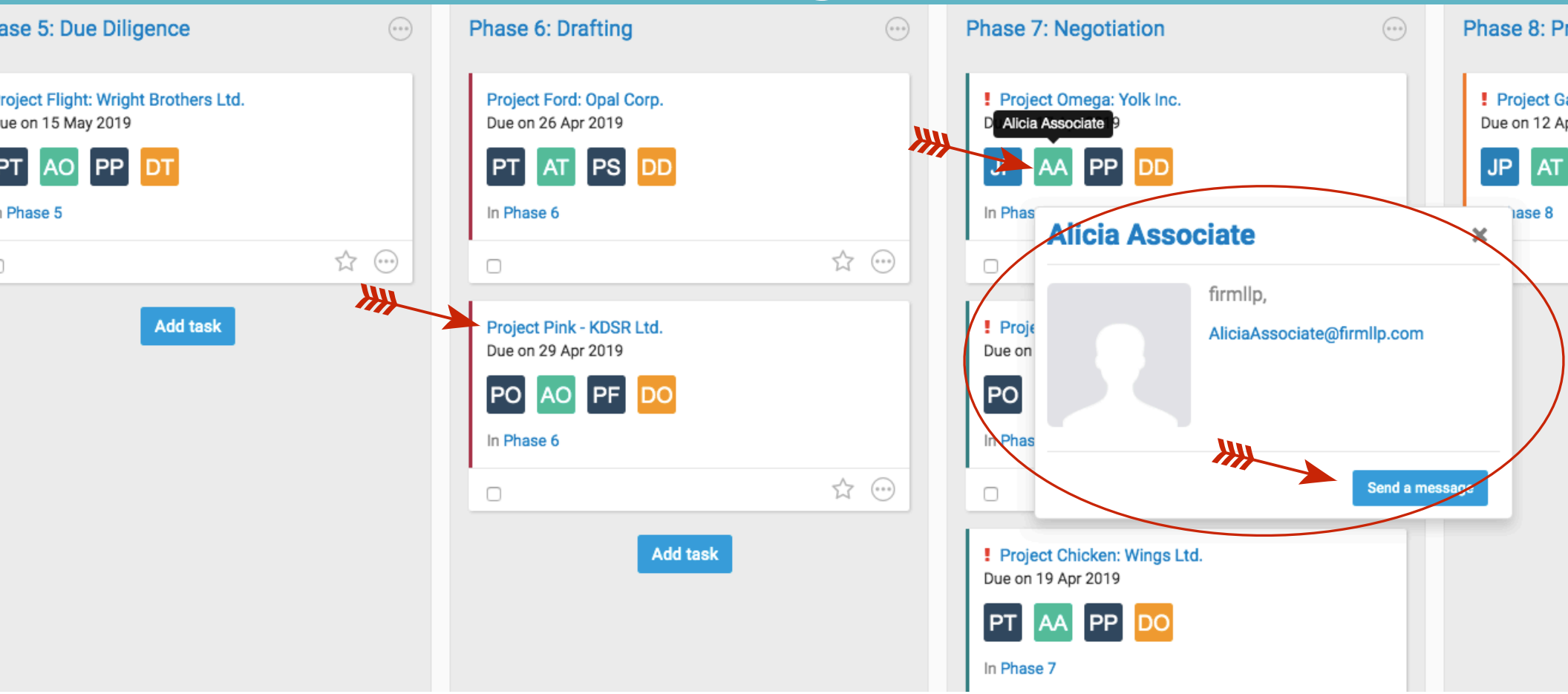
WIP - The Digital Version



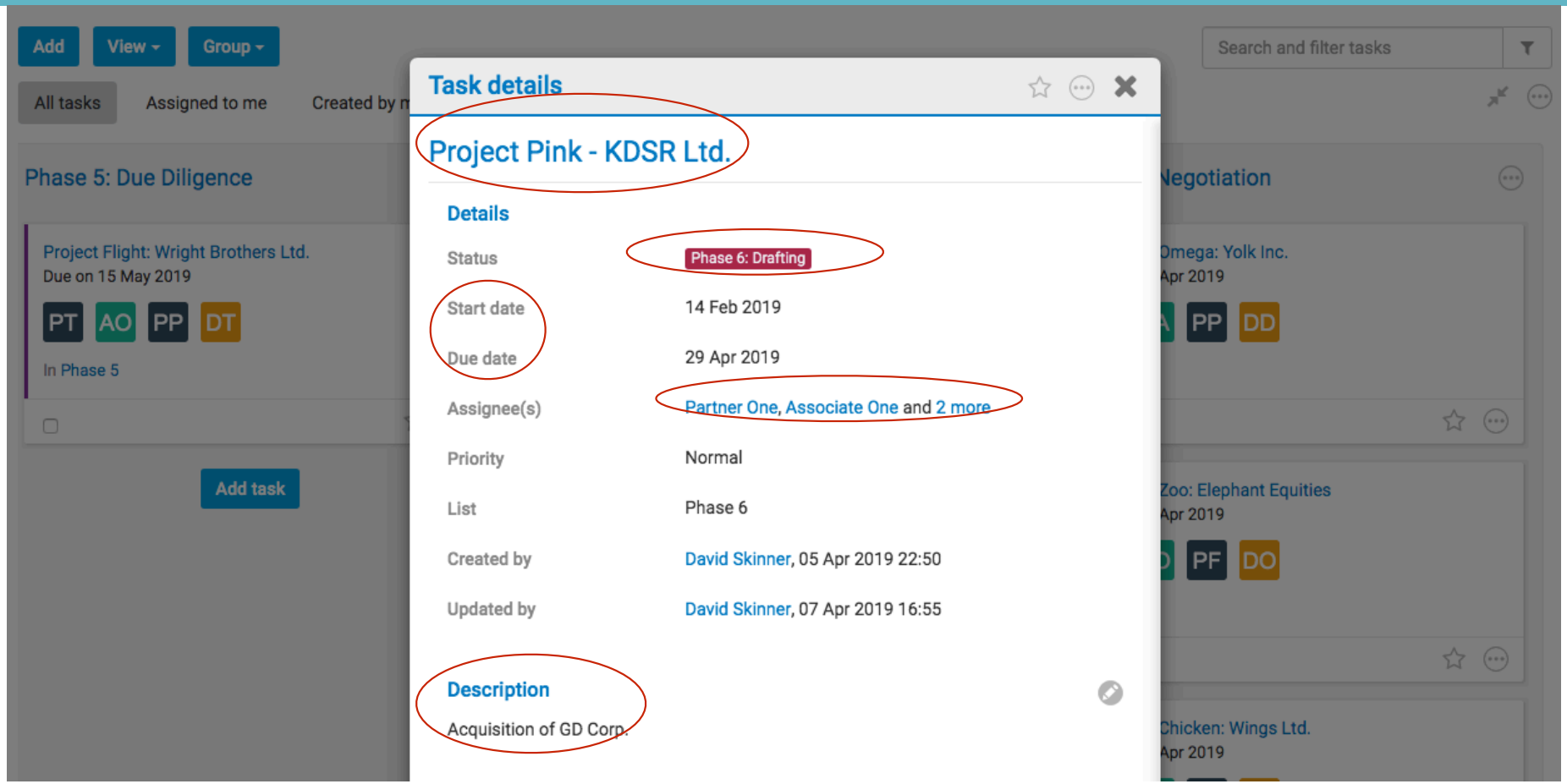
Who's Working on What?



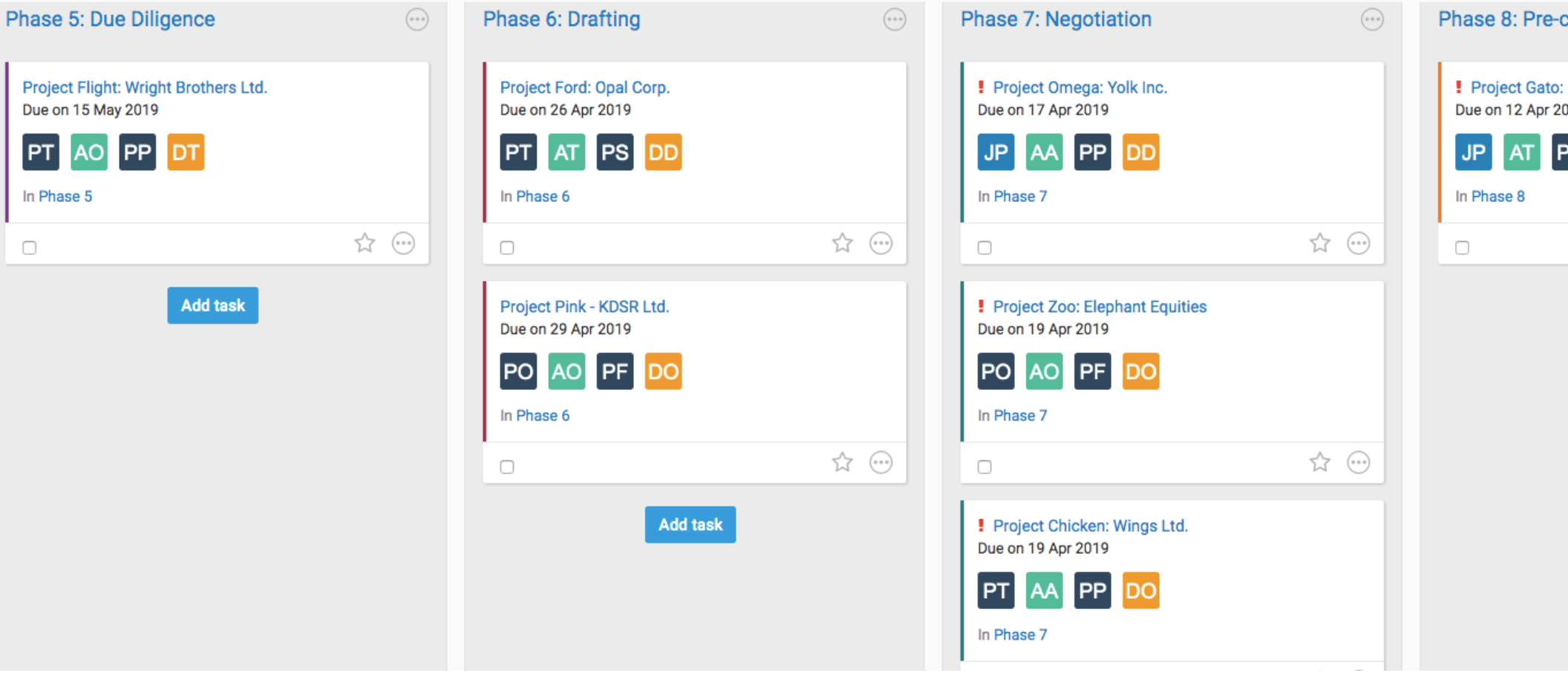
WIP - The Digital Version



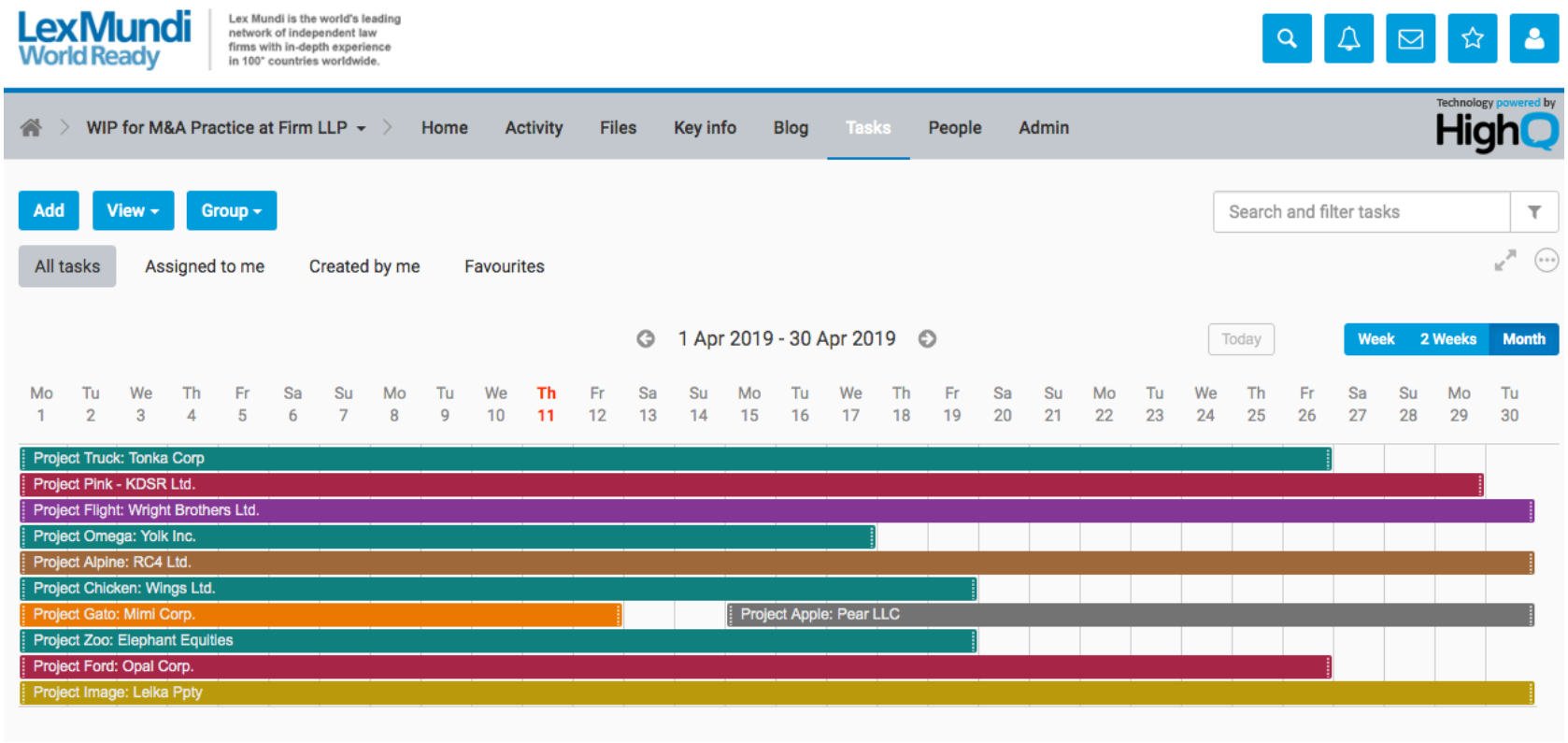
Matter Card Details



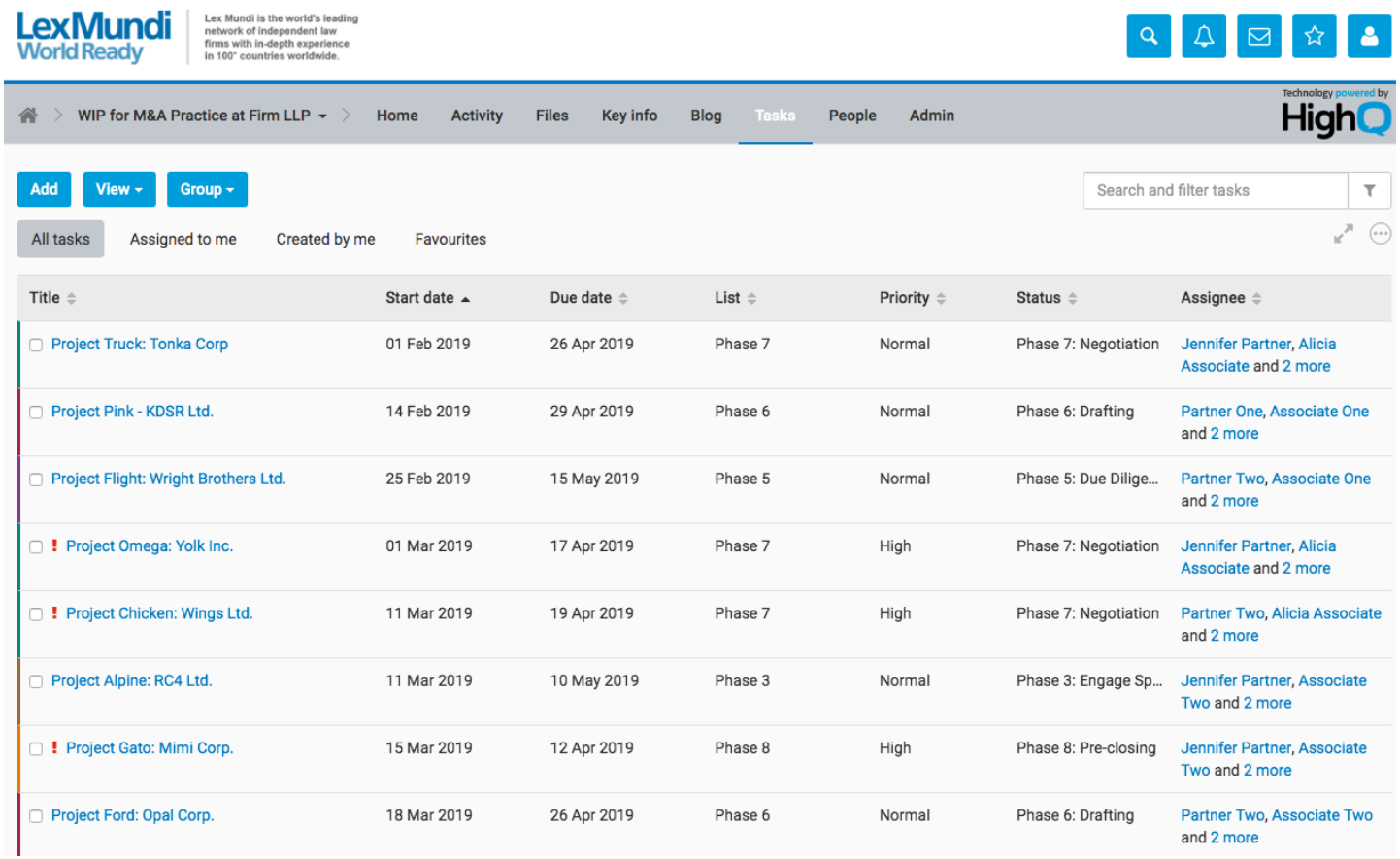
Card View


Phase 5: Due Diligence
Project Flight: Wright Brothers Ltd.
Due on 15 May 2019
PT AO PP DT
In Phase 5
Add task
Phase 6: Drafting
Project Ford: Opal Corp.
Due on 26 Apr 2019
PT AT PS DD
In Phase 6
Project Pink - KDSR Ltd.
Due on 29 Apr 2019
PO AO PF DO
In Phase 6
Add task
Phase 7: Negotiation
! Project Omega: Yolk Inc.
Due on 17 Apr 2019
JP AA PP DD
In Phase 7
! Project Zoo: Elephant Equities
Due on 19 Apr 2019
PO AO PF DO
In Phase 7
! Project Chicken: Wings Ltd.
Due on 19 Apr 2019
PT AA PP DO
In Phase 7
Phase 8: Pre-c
! Project Gato:
Due on 12 Apr 20
JP AT
In Phase 8

Timeline View



List View


LexMundi World Ready
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WIP for M&A Practice at Firm LLP
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View
Group
Search and filter tasks
All tasks
Assigned to me
Created by me
Favourites
Title
Start date
Due date
List
Priority
Status
Assignee
Project Truck: Tonka Corp | 01 Feb 2019 | 26 Apr 2019 | Phase 7 | Normal | Phase 7: Negotiation | Jennifer Partner, Alicia Associate and 2 more
Project Pink - KDSR Ltd. | 14 Feb 2019 | 29 Apr 2019 | Phase 6 | Normal | Phase 6: Drafting | Partner One, Associate One and 2 more
Project Flight: Wright Brothers Ltd. | 25 Feb 2019 | 15 May 2019 | Phase 5 | Normal | Phase 5: Due Dilige... | Partner Two, Associate One and 2 more
Project Omega: Yolk Inc. | 01 Mar 2019 | 17 Apr 2019 | Phase 7 | High | Phase 7: Negotiation | Jennifer Partner, Alicia Associate and 2 more
Project Chicken: Wings Ltd. | 11 Mar 2019 | 19 Apr 2019 | Phase 7 | High | Phase 7: Negotiation | Partner Two, Alicia Associate and 2 more
Project Alpine: RC4 Ltd. | 11 Mar 2019 | 10 May 2019 | Phase 3 | Normal | Phase 3: Engage Sp... | Jennifer Partner, Associate Two and 2 more
Project Gato: Mimi Corp. | 15 Mar 2019 | 12 Apr 2019 | Phase 8 | High | Phase 8: Pre-closing | Jennifer Partner, Associate Two and 2 more
Project Ford: Opal Corp. | 18 Mar 2019 | 26 Apr 2019 | Phase 6 | Normal | Phase 6: Drafting | Partner Two, Associate Two and 2 more

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