A POWERFUL & INTUITIVE INFORMATION GOVERNANCE PLATFORM FOR RISK-SAVVY FIRMS

iCOMPLi
by LegalRM

Efficient and compliant records lifecycle management

Without a clear, real-time picture of all the physical and digital assets your firm holds, where they are, who can access and at what stage they are in their lifecycle, how can you efficiently manage your firms records and comply with information governance policies, data privacy legislation and outside counsel guidelines?

What's more if you don't know what data you have, how can you protect it? For law firms of all sizes, iCompli simplifies and automates retention and disposition policies, client file transfers, and the overall management of both physical and electronic assets held in multiple information repositories, seamlessly and securely.

Plus, firms have the option of using iCompli's barcode tracking or RFID capabilities for managing physical records in conjunction with the system's information governance features, all within a simple user interface.

Save time

✓ Optimize senior lawyer hours with destruction authorization workflows that simply automate and engage.

✓ Find physical and digital assets quickly with targeted and saveable searches.

✓ Protect and speed up revenue streams by streamlining client on and off boarding.

✓ Facilitate Data Subject Access Requests (DSARs) in a timely manner.

Save money

✓ Reduce cloud and warehouse storage costs. Less content = less storage costs!

✓ No need for other third party applications to import, export or archive Information assets.

Protect reputation

✓ Reduce liability. Lost documents and failed audits can mean costly litigation.

✓ Reduce the quantity of data held to limit the risk if your firm is subject to a security breach.

All your assets in a single view

Whether an asset is physically held in a warehouse or in any one of your firms' repositories or applications it's presence, whereabouts, it's history and future can be surfaced in a singular view within iCompli.

Integrated physical records management

Regardless of where your firm is on its digital journey there is likely to always be a need to retain original paper files. And whether you are storing one document or thousands in an offsite facility (or in office cabinets and on desks!), you need to know what you hold and where it is.

What's more physical assets are subject to data privacy legislation so the ability to apply retention and disposition policies and to view an accurate and current list of what documents you are holding so that you can respond accurately to Data Subject Access Requests (DSARs) and apply legal holds is a must.

Using barcoding and RFID technology iCompli can provide a holistic approach to content management. Regardless of whether a matter file is made up of physical or digital documents, or a combination of both, it is possible to surface in iCompli an inventory of what documents you hold associated to a specific matter, or client and apply retention policies at either the asset or matter level if you need to.

Build and share reports easily

Real time, interactive business relevant views of records are instantly produced with iCompli's reporting dashboard. Your teams will have up to date and reliable data that can be used to visualize and action the next steps in information governance processes and workflows that are underway or due.

Comply with multiple data retention policies and keep cloud and warehouse storage costs under control

Across the world privacy legislation is exploding in complexity and clients are understandably being more and more demanding about how firms manage and retain their data. So, on top of the risk of fines, there is also the risk of losing clients and being sued!

iCompli assists law firms across the world manage their retention and disposition policies seamlessly and securely by providing a single view of all physical and electronic assets, across multiple information repositories. Our platform simplifies and automates retention, disposition, and overall compliance by:

▶ Creating rules and prioritisations for managing records retention regardless of whether the document is physical or electronic.

▶ Applying appropriate policies (or exceptions), to uphold internal governance directives, data privacy legislation or outside counsel guidelines, to an asset either at its creation or at any time throughout its lifecycle.

▶ Triggering disposition workflows and alerts to individuals or teams when files are due for review or disposition.

iCompli also fully integrates with the core systems used by firms, to ensure that compliance obligations are met in real time regardless of where your client or admin content resides.

Audits in a fraction of the time

Auditing is necessary for a multitude of reasons, including the need to know where an asset is located, the history of who has had access or confirmation that your firm's (and your client's) retention and disposition policies and being met.

iCompli can dramatically cut the time taken to audit your physical and digital assets, regardless of where they are held and provide a comprehensive audit trail for any given asset.

Complete control and tracking of who accesses your data

Ethical walls
iCompli can create and manage exclusionary and inclusionary walls to isolate records and matters from inappropriate access, or can integrate seamlessly with NetDocuments, iManage SPM or Intapp Walls.

Chain of custody
You can also demonstrate rigorous tracking of sensitive records thus reducing the risk of inappropriate access.

Find assets quickly

With visibility of all your firms' documents through one platform, finding digital or physical assets is simple. Users can search across all the metadata related to your digital records (across languages if necessary) globally. You can filter and narrow the search by criteria such as location, language, and client name (even a previous client name) and save your favourite searches, so it is even easier next time. Exporting results to Excel is easy with the click of a button, or you can navigate your information assets by iCompli's matter centric 'tree view'.

If you are hunting for a physical file iCompli's RFID tracker can find that too within moments, even if it's hidden in a cupboard or under a pile of files! And because iCompli is a platform independent cloud solution, there is no tie to specific proprietary hardware and you can use you existing mobile and tracking devices.

Time savings with automation and workflows

Productive time is lost every day to document handling and all those hours spent processing records are hours that could be billed or be used to more positive effect!

iCompli helps firms to stay not just on top, but ahead of their governance requirements by facilitating workflows (for example destruction authorisation workflows), automating tasks and alerting individuals or teams when content is due for review or disposition.

Efficiently manage the challenge (and opportunity) of client transfers

In recent years lawyer movement from one firm to another has increased dramatically.

To be successful firms need to support this movement and ensure a smooth transition of data. Whether it be outward or inward, the client transfer needs to be compliant with internal information governance policies.

And don't forget that first impressions are key to building a long and fulfilling relationship with your firms' new clients, so client service needs also to be a priority throughout the procedure.

iCompli supports firms by streamlining the process of client file transfers accurately, whilst reducing risk, improving client service, and growing revenue faster.

▶ Record transfer requests for on and off boarding, or a client request.

▶ Collate and appraise the data for migration / ingestion.

▶ Automate transfer workflows plus increase visibility and reporting capability on actions and status.

▶ Create an audit trail of actions and approvals.

Manage legal holds efficiently

iCompli's dual level litigation hold functionality helps you to gather and audit records while respecting directives. Also, the platform allows for court-ordered destruction and includes full audit trails and certification.

Build client trust

Protecting and managing client data correctly is imperative to delivering legal services and building the trust of your clients, but so is demonstrating the rigor in which it is being done.

iCompli can apply outside counsel guidelines to anything from a client matter to an individual asset and compile reports to prove that guidelines are being met if necessary. Plus, well-managed data improves the efficiency of legal processes, such as Data Subject Access Requests (DSARs). Your clients will benefit from faster access to relevant information when they need it.
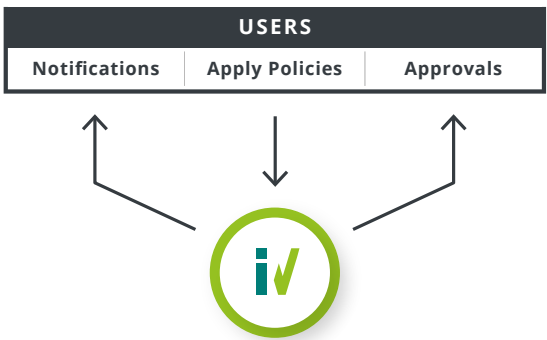
In addition, if you are looking to gain and retain ISO/IEC 27001 certification, iCompli can help firms demonstrate the necessary information governance requirements.

Seamless integration

iCompli can be integrated and embedded within many of the applications firms use which allows your teams to work where they usually work (for example in MS Teams, Sharepoint, iManage Work or NetDocuments), without switching windows.

This seamless transition from your platforms to iCompli aids the process of user adoption across your firm.

Some of our integrations are listed in the diagram, but we can also integrate (in a bi-directional manner) with your firms practice management, time and billing, or any application your firm uses through our REST APIs and extensive network of partners.

USERS		
Notifications	Apply Policies	Approvals

Time & Billing Systems

ELITE™   Aderant

SurePoint

User Data

Active / User Directory

HR Database

METADATA SOURCES

API CONNECTION

RISK MANAGEMENT INTEGRATIONS

API CONNECTION

Ethical and Commercial Walls

iManage   CAM

intapp WALLS   netdocuments

Litigation Holds

intapp WALLS

Compliance/Outside Counsel Guidelines

intapp   Virgo

iManage

netdocuments

Office 365

File Shares

HighQ

CONTENT REPOSITORIES

API CONNECTION

WAREHOUSE INTEGRATION

API / SFTP / EMAIL

IRON MOUNTAIN®

ASi Andrews Software, Inc.

Total Recall

oneilBridge

About iCompli

iCompli is used by firms large and small internationally to help them mitigate risks and reduce costs by facilitating complete and compliant control of their documents and assets as they progress through their lifecycle.

We work in partnership with our clients to ensure that the solution we deliver fulfils their exact requirements and is deployed on time and on budget.

Through our integration with many other solutions that firms use we can surface a complete view of all physical and digital records in iCompli and through workflows we can automate information governance processes and procedures.

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