



## **Introduction to the SmartPanel Basic Package**

In-house teams are coming under more pressure to reduce the cost of sourcing and delivering legal services; whilst keeping the quality of work high. Smarter ways of sourcing and managing work are therefore essential.

This is where the centralised **SmartPanel** selection product comes in. **SmartPanel** has been designed to improve the lifecycle of the panel relationship – it combines a ready to use technology platform (the SmartPortal) with template documents/ forms to assist different stages of the panel lifecycle.

The three key stages being beginning, middle and end. Whilst the full features and benefits of **SmartPanel** for these are set out in Appendix 1 (please see below) the goals are as follows.

### **SmartPanel Tendering Goals (Stage 1) are to:**

Provide the In-house legal team with a centralised online platform to carry out a panel selection.

1. Save time and money by using leading edge templates and technology to carry out the panel selection process.
2. Provide access to industry best practice as part of the package

The Tendering Process is designed so that the In-house team can invite prospective tendees on to the **SmartPanel** Space where they can submit all the information required in the Invitation to Tender (ITT) document. The In-house team can also provide relevant information including frequently asked questions so that this information is provided once and instantaneously to all submitting firms. Further any documentation required from the external lawyers can be updated within seconds (via the wiki a component part of the product)

This therefore reduces costs, increases speed and efficiency for the tendering process from which all parties will benefit.

### **SmartPanel Relationship Goals (Stage 2) are to:**

Ensure a smoother start to the relationship with selected panel firms by creating a shared collaboration space for sharing precedents, metrics of the service and other relevant information.



As the communication process using **SmartPanel** is simple, effective and speedy, this will improve managing the actual delivery of the promised service to the agreed success criteria and key performance indicators agreed between the parties. **SmartPanel** will also record all the learning and any benchmarking exercises undertaken so to provide a quick start for the whole cycle to start again.

### **SmartPanel Appraisal (Stage 3) – review to renew or disengage panel relations:**

Allow all parties the opportunity to take part in benchmarking exercises at a favourable rate.

1. Provide a known exit process for panel firms where appropriate.
2. All relevant information for the next tendering cycle will be in a centralised location for a speedy renewal stage.

**For more details please contact Ann Page or Alex Ang.**

### **Appendix 1 – SmartPanel Basic Package for UNUM consists of:**

#### **Stage 1 – For Panel Selection**

<b>Features</b>	<b>Benefits</b>
Key documentation and forms to cover the panel selection process: a) Legal Strategy Framework for Panel Selection b) Project Documentation Templates for managing this process c) Panel Scoring Spread Sheet d) Panel Tendering Document e) Managing External Legal Resources Book by Ann Page and Richard Tapp	Industry Best Practice Templates for immediate use by the In-house team in assessing legal needs and translating these into the Tender Document. Flow Chart of process and documentation to track and assess the process. Having a bank of industry best practice documents for the panel selection process makes compiling information about law firms easier, quicker and more efficient thus saving time and costs.
Small setup fee (which includes licences to use documentation and software) for panel selection. This cost may be divided between the winning Panel Law Firms.	The In-house team can set this up to offset the setup fee and therefore does not have to budget for the cost of using or accessing this product.
Complimentary coaching sessions by telephone on panel selection by an expert in this field – Ann Page	Complementary coaching session by industry expert provides in-house lawyer with detailed knowledge of how best to make use of the <b>SmartPanel</b> best practice templates.



# Managing External Legal Resources



The extremely flexible platform of SmartPortal for the <b>SmartPanel</b> product	Complete control over customising the SmartPortal – this results in a SmartPortal that is tailored to the specific branding/ needs of the in-house department.
Options to upgrade <b>SmartPanel</b> package with access to further SmartPortal technology.	Wiki, discussions centred around blogs and a shared bookmarking tool, Diigo for use within the In-house team and with the law firms.

## Stages 2 and 3 – For Panel Relationship

Features	Benefits
A shared space (using SmartPortal) which can be used as an exchange of specific matter information and documents between the In-house team and law firms	Quick and easy access to a bank of documents through a shared space enables the In-house team to be constantly updated on relevant legal issues and see what matters are with whom. The panel firms can build up a bank of documents for the In-house team which can be categorised and is a far more superior method than emailing, as all the documentation is in one place.
Industry Best Practice Templates to monitor Performance	Ability to benchmark performance of external law firms through pre-packaged KPIs leads to a more productive relationship with your legal service providers.
Diigo – a cloud-based collaboration tool that integrates within the SmartPortal	Allows you to clip information once and share it with multiple parties. Effective collaboration within the in-house team through SION1 apps results in a steady stream of knowledge which is accurate and up-to-date.
Information sharing builds good relationships with your panel law firms	Genuine two-way communication encourages a faster and smoother communication process (In-house department decides how much information is accessible by each law firm) which saves time and increases efficiency.
Innovative and fair billing	Using the SmartUnits billing model allows the cost to be be fairly distributed between the panel law firms benefiting from the outsourced legal work.
Security – There are 4 levels of security: password protected, encryption layer, permission levels, backup	Certainty about access to and protection of all information.



# Managing External Legal Resources



Options to upgrade technology; Mobile Apps	Mobile Apps – SmartPortals have a range of mobile apps to accompany the web-based system for both law firm and In-house users, without the cost and inconvenience of developing your own mobile apps. Incorporation of mobile apps means the solution is truly forward-looking and allows the In-house team to 'work on the go' without the inconvenience of developing their own apps.
Next Tender processing made easy	The <b>SmartPanel</b> will contain all the relevant information that will be necessary for the next Tendering Cycle.
Access to special rates for Relationship Management Training/Coaching	To embed new working practices for internal and external lawyers or providing investigation/arbitration for issues that arise during the lifecycle of relationships.