



Leveraging Innovation to Conquer Complexities for Law Firms

In the ever-evolving landscape of legal technology, learn how Aderant is helping shape the future of law firms.

In the legal world, navigating the complexities of client relationships can be a formidable task because there are so many moving parts. Maintaining compliance with rules and guidelines can be a challenge, and it's important that law firms have more innovative solutions designed to solve problems they are facing. At Aderant, we have developed an intense focus on bolstering our ability to transform these complexities into enhanced, quality experiences that help law firms meet the everyday needs of their clients.

Our core business has always been about strengthening the law firm back office, and by making long-term investments driven by the needs of lawyers and legal staff, we are effectively helping law firms around the world serve their clients more effectively.

MADDI: A Revolutionary AI-Powered Virtual Assistant

Aderant has fully embraced artificial intelligence (AI) and will continue to make important integrations every quarter to drive innovation across the industry. In 2023, we leaned into that mission by introducing MADDI, a revolutionary new AI-powered virtual associate being applied across our suite of product solutions. MADDI is intuitively designed to not only automate routine, repeatable tasks but enable actionable insights and behavioral prompts to optimize complex activities across the firm. Our pre-trained virtual assistant brings calm to the rising tides of billing and matter management by harnessing the power of AI through automation and predicted activities that streamline manual processes. MADDI is infused with multiple language models and Aderant applications that also power its ability to have a continuous learning path. Going forward, it will serve as the central nervous system of Aderant products, providing clients with a breakthrough solution that solves some of the world's biggest challenges across the legal ecosystem.

Art of the Possible with AI

Working with AI entails seeing the art of the possible, and then determining the potential and practical uses of the technology. To drive meaningful innovation across the industry, Aderant is following a multi-step process that ensures our new AI capabilities are tested, secure, and proven to solve problems for law firms.

This always-on comprehensive process includes:

- **Experimentation:** Testing and experimenting with different AI technologies allow us to determine which tools are useful for our clients. The experimentation phase allows us to make scripts more performant, and about to engage in creative problem solving that extract greater value.



- **Deploying for Productivity, Inside & Out:** Our goal in incorporating AI into our products is to make our teams and law firm clients both more productive and efficient. Aderant is leveraging AI technology not only in our product development, but also in our internal marketing, sales, and other areas to boost productivity and accelerate performance.
- **Transforming Client Experiences:** Aderant uses AI to deliver newly transformed client experiences for our existing suite of solutions. We aim to increase user satisfaction and achieve greater returns for clients on their investment in our products.

Ending OCG Compliance Challenges for Law Firms

The release of MADDI was a bridge to building a roadmap designed to propel law firms to new levels of success. MADDI was also a catalyst for the release of Onyx, a revolutionary AI-powered solution that transformed Outside Counsel Guideline (OCG) compliance for law firms.

In the past, firms relied on a combination of manual and semi-automated systems to handle the daunting task of OCGs, timekeeping, and billing. With the release of Onyx, law firms now have their first AI-powered platform that automates and unifies OCG compliance across all three areas.

Onyx has also reshaped the intake process for law firms, which can expose law firms to significant risks if not handled properly. With Onyx, law firms now have better capabilities to de-risk the intake process and ensure compliance throughout the client relationship. Whether its identifying and addressing problematic terms, staying organized, bolstering collaboration through the client review process, or adhering to client terms more effectively, Onyx gives law firms an effective solution that solves a problem that has been a thorn in the side of law firms for decades.

MADDI has also been integrated into iTimekeep's Passive Time Assistant. This has bolstered iTimeKeep's ability to prevent unaccounted billable time by seamlessly tracking and capturing time spent on various activities. In the future, MADDI will also power enhancements to Milana's cloud-based docketing system. These integrations will enable Aderant to stay at the forefront of innovation and exploration for the foreseeable future.

Expert Sierra and Shifting to the Cloud

Cloud-based technologies will be an integral part of the day-to-day operations of law firms in the future, and Aderant is already shaping what that will look like for the industry. Expert Sierra, our comprehensive end-to-end legal practice management cloud solution, has enabled us to apply many new products and updates much faster, providing law firms with real-time solutions to help them run a better business. Over the past two years, 90% of law firm clients have come to Aderant via Expert Sierra and 25% of our clients previously using the Expert on-premise version have made the transition to the cloud-based platform. This is a testament to Expert Sierra enabling law firms to seamlessly transfer their customizations and integrations with ease.



The “next big thing” for Expert Sierra will be the release of our new Cloud Accounts Receivable (A/R) product in early 2024. MADDI will be integrated into this new product to drive greater automation of mundane tasks that A/R professionals manage daily. We are taking some core parts of Expert Sierra and enhancing them with AI to create more modern technology suited to accommodate the complex needs of law firms. This will be one of many releases that add mobility, agility, collaboration, and automation through one single platform.

Enhanced Security Through Roper Technologies and Reviews

With every product launch, our security team does a full comprehensive review. One of the substantial benefits of being one of the 27 companies that make up Roper Technologies is that Aderant has additional capabilities to ensure security and compliance. Companies under the Roper Technologies umbrella share knowledge, and our leadership and technology teams participate in ongoing conversations to strengthen security across all our products and our company. The invaluable resources and relationship that Roper Technologies provides has allowed us to build a more secure experience for our clients and our employees.

As a company, Aderant also participates in SOC 2® Type II examinations to ensure that our products and systems are effectively safeguarding the personal assets of both potential and existing clients. These examinations have international recognition, and serve as a confirmation that our infrastructure, software, personnel, data, policies, procedures, and operations have undergone comprehensive examinations and reviews.