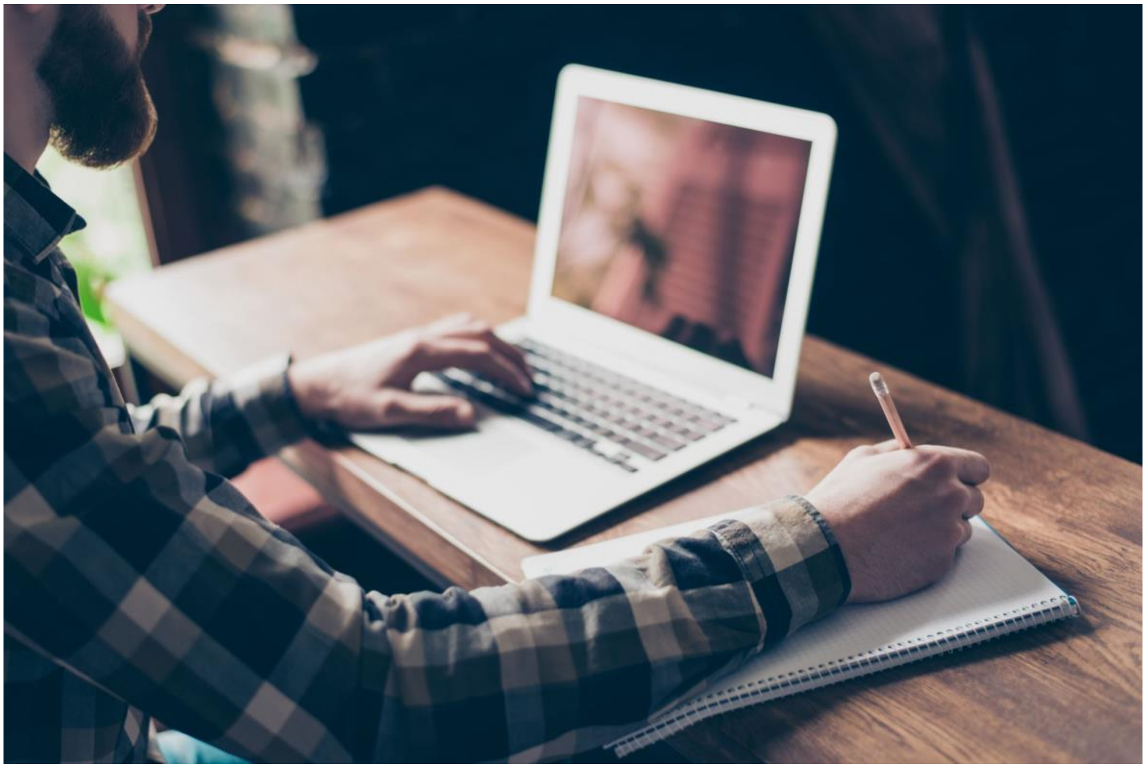


CounselLink Education

Table of Contents

CounselLink Education Team

Francine Kalogerou

Learning Technologist

With over two decades of training in the legal, healthcare, and publishing industries, Francine drives professional growth. At LexisNexis, she creates engaging training materials and expertly guides users to master CounselLink.

Melissa Clark

Learning Technologist

Melissa brings over a decade of proven training expertise in the financial industry. At LexisNexis, she empowers professionals to master CounselLink and the Juris core application through engaging instruction and hands-on training. In addition, she designs innovative curricula and offers expert consultations to drive success.

Instructor-Led Class Menu

All CounselLink instructor-led sessions follow a standard agenda, tailored to your organization's configurations. Our training team consults with you to mix and match content, crafting a training plan that meets your users' unique needs.

Work Management

Class Name	Description	Length	Content
Working with Matters	Create and Manage Matters	60 mins	• Launch and set up new matters • Effectively manage matter details • Configure matters for seamless e-Billing • Search matters with ease • Navigate advanced matter management features
Legal Holds in CounselLink	Optimize Legal Hold Management	60 mins	• Initiate and manage legal holds • Customize notifications with drafting and assignment • Modify legal hold email settings
Introduction to Work Intake	Streamline Work Intake Processes	60 mins	• Efficiently create work intakes • Manage key intake information fields • Seamlessly convert intakes into actionable matters

Financial Management

Class Name	Description	Length	Content
Working with Invoices	Invoice Review and Approval	60 mins	• Seamlessly locate and navigate invoices • Review charges • Easily add notes and attachments • Understand the approval process
Working with Budgets	Efficient Budget Creation and Management	60 mins	• Quickly set up and manage budgets • Effectively track and plan overall legal spend
Working with Expense and Indemnity Reserves	Create and Manage Reserves and Indemnities	60 mins	• Efficiently create and manage reserves and indemnities
Working with Accruals	Create and Manage Accruals	60 mins	• Create and manage accruals efficiently for better financial control

Reporting

Class Name	Description	Length	Content
Report Functionality **Note: participants need a Report license to access the Reports feature*	Basic Report Navigation, Editing, and Creation	90 mins	• Execute, customize, save, and export report templates • Develop and manage subscriptions • Create a report from scratch
Introduction to Analytics **Note: the organization must opt-in to see benchmark data*	Analytics Dashboard and Benchmark Insights Overview	60 mins	• Drill down data to investigate potential savings and spending opportunities • Analyze dashboards to compare your performance against nationwide benchmarks

Power User

Class Name	Description	Length	Content
Corporate Administration	Understand Organization-Level Tasks	30 mins	• Organize and streamline categories • Customize notification messages • Manage email templates • Tailor folder templates
Invoice Administration	Optimize Invoice Workflow Management	30 mins	• Efficiently track and transfer invoices • Navigate diverse workflow actions • Create and manage volume discounts • Enforce reviewer authority
Matter Administration	Enhance Matter Management Processes	30 mins	• Configure and manage matter types • Update allocation contacts and groups • Utilize powerful mass action features
User Administration	Manage User Profiles and User Administration Tasks	90 mins	• Navigate CounselLink for user administration • Manage user accounts • Review and refine office profiles • Monitor system performance
Work Intake Administration	Manage Work Intake Process	30 mins	• Create new and manage existing work intake forms
Law Firm Management	Streamline Law Firm Coordination in CounselLink	60 mins	• Manage fee offers and matter change requests • Manage law firms • Update billing guidelines • Analyze law firm performance

Law Firm Specific

Class Name	Description	Length	Content
Law Firm Administration	Streamline Administrative Tasks for Law Firms Using CounselLink	60 mins	• Manage the law firm profile • Manage timekeepers • Leverage volume discounts • Create and manage fee offers
Law Firm Essentials	Manage Organizational Tasks for Law Firms Using CounselLink	60 mins	• Quickly locate and manage matters • Seamlessly submit, create, and manage invoices
Working with Budget and Accrual Requests	Learn CounselLink's Budgeting and Accrual Functionalities	30 mins	• Learn how to set up, review, and optimize budget submissions with precision • Master the techniques to handle accrual requests efficiently and accurately

Contract Lifecycle Management (CLM) Specific

Class Name	Description	Length	Content
CLM Administration Tasks	Manage CLM with Administration Tasks	90 mins	• Effectively manage users and teams • Design and implement workflows • Customize and manage fields tailored to your business needs • Utilize dynamic templates
Managing Contracts	Chief Negotiator and Contract Management Tasks in CLM	90 mins	• Evaluate contract requests with proficiency • Gain insight into contract stages • Facilitate collaborative discussions and efficiently manage documents • Successfully close contracts
Reviewing Contracts	Navigate and Review Documents in CLM	30 mins	• Understand CLM Navigation • Easily accept invitations • Review documents • Leverage discussion features for effective collaboration

Training Assumptions

The following assumptions apply:

- Participants understand CounselLink's purpose and their role within the application
- Training sessions are set up by the trainer via Zoom
- A designated contact from your team coordinates employee participation and training notifications
- A designated contact attends all sessions to address any questions regarding your internal processes
- Sessions are conducted in the CounselLink training environment—with select parts potentially demonstrated in your live environment as appropriate
- Class sizes are capped at 15 participants for optimal engagement
- Live training sessions are not to be recorded or copied

Cancellation

Last-minute schedule changes can impact LexisNexis resource planning. If you need to reschedule trainers, please provide at least one week's written notice. With less than one week's notice, we will try to reschedule but cannot guarantee your preferred timeframe.

Instructor-Led Training

Monthly Free Virtual Instructor-Led Classes

- Access LexisNexis University to view the available schedule:
  1. Visit LexisNexis University
  2. Log in with your existing account or register as a new user
  3. Click on **Product Training** at the top of the page
  4. Choose **CounselLink—Corporate** or **Contract Lifecycle Management (CLM)** from the available options
  5. Choose a virtual class:
     - Corporate Administration
     - Invoice Administration
     - Matter Administration
     - Work Intake Administration
     - User Administration
     - Law Firm Management
     - Report Functionality
     - Introduction to Analytics
     - Administrator Tasks in CLM
     - Managing Contracts
     - Reviewing Contracts
     - Trainer Choice Tuesday (Topic Changes Monthly)
  6. Click **Register** for your preferred class and date

Private Training Pricing

- 1 hour: $440
- 3 hours: $1,100
- Onsite (6-8 hours): $2,200 + Travel and Expenses

Note: Pricing listed above is subject to change. Professional Services Plans (PSP's) can be used for training services.

Self-Paced Learning

Answer Center

The CounselLink Answer Center is your go-to resource for detailed, step-by-step guidelines and expert best practices. Access it anytime by using the provided link to quickly find the solutions and insights you need: CounselLink Answer Center.

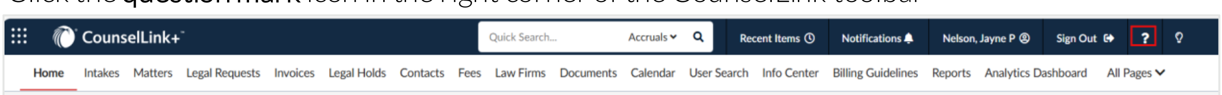
Free On-Demand Training

- Access LexisNexis University to view the available schedule:
    1. Visit LexisNexis University
    2. Log in with your existing account or register as a new user
    3. Click on **Product Training** at the top of the page
    4. Choose **CounselLink—Corporate** or **Contract Lifecycle Management (CLM)** from the available options
    5. Narrow your search by clicking on **On-Demand Training** in the left corner of the page
    6. Click **Launch** to review the training

Documentation

Users are welcome to print topics if they prefer a hard-copy job aid. Access them from the CounselLink Answer Center or while logged into CounselLink.

- Additional Documentation
- Access the In-Application Guides for videos and general instruction
    1. Click the **question mark** icon in the right corner of the CounselLink toolbar



    2. Select **Learning Center**
    3. Click **Quick Reference Guides** or a **help topic video**

Law Firm Training Resources

Law Firm Answer Center

The CounselLink Law Firm Answer Center is the go-to resource for detailed, step-by-step guidelines and expert best practices for law firms: CounselLink Answer Center.

Monthly Free Virtual Instructor-Led Classes

- Access LexisNexis University to view the available schedule:
    1. Visit LexisNexis University
    2. Log in with your existing account or register as a new user
    3. Click on **Product Training** at the top of the page
    4. Choose **CounselLink—Law Firms** from the available options
    5. Choose a virtual class:
        - Law Firm Administration
        - Law Firm Essentials
        - Working with Budget and Accrual Requests
    6. Click **Register** for your preferred class and date

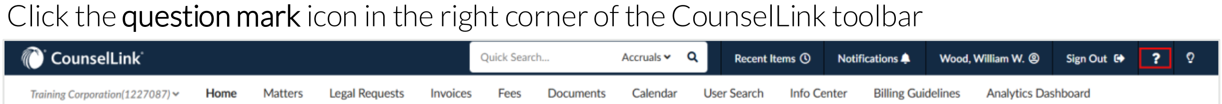
On-Demand Training

- Access LexisNexis University to view the available schedule:
    1. Visit LexisNexis University
    2. Log in with your existing account or register as a new user
    3. Click on **Product Training** at the top of the page
    4. Choose **CounselLink—Law Firms** from the available options
    5. Narrow your search by clicking on **On-Demand Training** in the left corner of the page
    6. Click **Launch** to review the training

Documentation

Law firm users are welcome to print topics if they prefer a hard-copy job aid. Access them from the CounselLink Answer Center or while logged into CounselLink.

- Access the In-Application Guides for videos and general instruction
    1. Click the **question mark** icon in the right corner of the CounselLink toolbar



    2. Select **Law Firm Learning Center**
    3. Click **Quick Reference Guide** or a **help topic video**

Contact Us

Team	Contact Info
LexisNexis Training	LNTraining@lexisnexis.com
LexisNexis Documentation	documentation@lexisnexis.com
CounselLink Support	ask@lexisnexis.com