



THE PACE OF CHANGE  
AND VOLUME OF EMERGING  
TECHNOLOGIES CAN  
BE OVERWHELMING.  
BY ENGAGING FOURLINES,  
WE CAN FOCUS ON  
GROWING OUR BUSINESS.

### AT THE FOREFRONT, FOCUSED ON SOLUTIONS

FourLines is a division of Cassels that assesses, pilots, and implements streamlined workflows, specialized staffing models, and the most current technology to improve both the quality and timeliness of our legal advice and related services.

It is both a re-imagining and an extension of our service offerings, built to keep up with your needs and the shifting demands of the market.

*Client Testimonial*

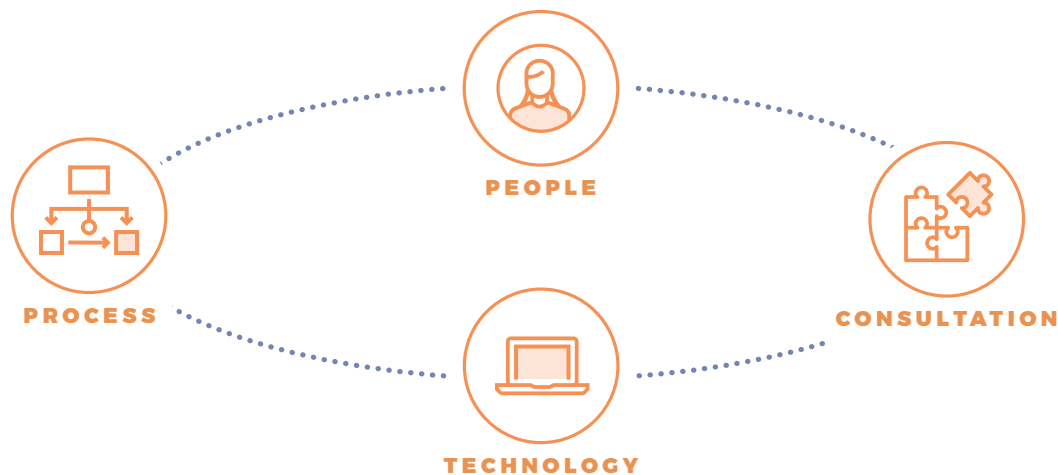
## why fourlines?

FourLines refers to the solution to a traditional pen and paper puzzle: to connect nine dots arranged in three rows using only a continuous set of four straight lines. Finding the correct answer requires thinking “outside the box” – both literally and figuratively.

## our approach

Technology challenges us to continuously adapt and improve our approach to the practice of law. Our belief is that it takes more than the newest software or high-cost consulting to meet that objective. Modern problem solving requires a substantive change in approach when it comes to leveraging technology to produce the best results.

**Our division provides direct access to a diverse and integrated team of experts, market-leading technologies, and client solutions – the common denominator being excellence in our service delivery.**





## process

Continually analyzing our legal service delivery processes, identifying inefficiencies, and developing or implementing the architecture required to drive sustainable cost-savings and value.

### ANALYZING

Process improvement methodology can be overwhelming. Our approach is straightforward: first, collect and interpret process-related data to understand what's happening, then eliminate the steps that don't add value. The resultant base line allows for scalable improvement of only the most efficient practices and clarifies priorities relative to impact and sustainability.

### CONTINUALLY IMPROVING

Understanding how processes work and isolating the required changes can immediately improve quality and result in cost- and time-savings; however, our focus on continuous improvement has established a collaborative cycle of ideation and a firm culture of innovation.

### IMPLEMENTING

Working with engaged stakeholders to isolate both potential areas for improvement and their effect on other areas of our business fosters a team-based approach to problem solving that supports both the implementation of improved process and the development of new process-related initiatives.

### CLIENT NEEDS

Our client's needs are at the core of everything we undertake. Through engagement and feedback, observation, and empathy, we ensure that complex projects are properly scoped and the outputs of any process improvement exercise meets the goal of improving both the quality and timeliness of our legal advice and related services.

## REPRESENTATIVE OUTCOMES

- **What's Market?** Current and relevant expertise at your fingertips — immediately. Our FourLines team has architected a means of classifying and capturing the historic and rolling intellectual capital of the Firm in meaningfully searchable collections by using existing capabilities within our document management system and other tools.
- **Client Reporting.** Improved production, delivery, and storage of client-facing reporting materials on every firm transaction. Our streamlined and “paper-lite” workflows ensure that reports are generated immediately upon the conclusion of a matter, and our easily accessible client extranets make them available on demand and on a self-serve basis.
- **Matter Intake.** Intake workflows provide clients with access to our intuitive automation platform. This client-led, questionnaire-driven process generates relevant documents based on your responses, initiating collaboration between your team and our industry group experts at the appropriate and most cost-effective time.
- **Compliance.** Legislative amendments require companies to monitor their risk through ongoing compliance. For example, our Corporate Services team recently leveraged an automated FourLines solution to provide clients with a means to prepare and maintain registers of “significant individuals” of private companies in various jurisdictions.



## people

Bringing intra-preneurial spirit, diverse perspectives, and deep experience in substantive areas of law, project and change management, legal ops, and legal tech and innovation, to ensure effective outcomes and client satisfaction.

### EFFECTIVE OUTCOMES

Client challenges can be complex – blending legal, financial, technological, and other considerations – and solving them in an efficient and effective way that ensures client satisfaction requires a coordinated and holistic approach.

### DIVERSE PERSPECTIVES

Diversity of perspective is core to legal service delivery. Consequently, the foundation of FourLines is our interdisciplinary team, which leverages substantive legal knowledge and expertise in other disciplines.

- Partners of the firm with varied industry experience, working in collaboration with our lawyers, paralegals, and law clerks.
- Experts in legal lean sigma, project management, change management, knowledge management, information technology, and data analytics.
- In consultation with respected vendors in the legal market, professionals dedicated to developing highly specialized expertise on the various FourLines tools and technologies.

### INTRA-PRENEURIAL

It is the intra-preneurial nature of our FourLines team that fuels successful innovation in client service delivery. Our division operates like a start-up – identifying opportunities, adapting through feedback and iteration, and always challenging the status quo (which requires resilience and perseverance). Our team is driven by vision and curiosity that compels and inspires others to collaborate, effecting positive change.

### REPRESENTATIVE OUTCOMES

- **Time and Cost-Savings.** Tools alone cannot capture the full potential for improvement that our FourLines approach can. In two of our disciplines, our studies show that leveraging the industry-standard technology alone results in time savings of roughly 40 to 50 percent, while layering on our alternative staffing models results in cost savings of 75 percent or more relative to standard hourly rates.
- **Project Management.** We assign dedicated project managers to each transaction management and document review engagement. Oversight by trained professionals guarantees successful completion — including improving productivity and cost certainty — but has also shown a measurable improvement in team morale.
- **Right-Staffed.** All tools require both initial training and frequency of use to properly capitalize on investment. We foster specialized expertise and ensure that the “right” person performs each task. As the beneficiary of our team’s expertise, our legal professionals can focus on their respective areas of expertise — a combination that provides the greatest value.



## technology

Navigating the complexity of the legal tech landscape, deliberately and creatively applying appropriate technologies internally, and collaborating with our clients through leading-edge tools that enhance all aspects of legal service.

### NAVIGATING COMPLEXITY

Not all tech is created equal. Increased access to and the availability of legal technology, including the rapid pace at which new vendors emerge or bring their solutions to market, can be difficult to navigate. Our dedicated resources for the assessment and piloting of the most current technology can quickly cut through the noise to identify the appropriate tools for a particular situation.

### OPTIMIZING

We acknowledge that technology is a means, not an end. Applying technology to further improve a process is always made after a process is clearly mapped and the need and solution requirements have been clearly defined. Context is essential to ensure that the value of tech is optimized and the return on investment is realized.

### CREATIVE USE

Our unique value lies in our ability to transform “out-of-the-box” technologies into the best possible user experience, either through vendor-supported customization or seamless integration with other workflows or technologies. A deep understanding of the tools deployed, combined with the demands of practicing law, have resulted in the creative use of these tools – elevating their capability beyond their original purpose.

### LEADING-EDGE TOOLS

It is often not cost-effective for an organization to acquire technologies or dedicate resources to gain the required expertise. Instead, engaging law firms to access their processes, tools, and expertise can be the most effective solution. Rather than simply trying to sell old services by utilizing new tools, we invite clients to access our FourLines tools and technologies (including with respect to due diligence and contract analysis, transaction management, workflow automation, and contract digitization), as supported by our team of experts.

## REPRESENTATIVE OUTCOMES

- **Client Extranets.** Addressing the inefficient production of high-volume agreements, we leveraged a user-friendly document automation tool to create customized client-facing sites. Capable of housing automated versions of bespoke agreements, these sites have both improved document production for our client (saving an average of 80 percent in drafting time) and reduced potential for error.
- **AI-Assisted Document Review.** Artificial Intelligence is transforming due diligence and similar contract review requirements in the legal industry. We were early adopters of AI-assisted technologies for document review and have honed our expertise to extract relevant information from a large volume of highly diverse document sets with incredible speed (60–90 percent less review time) and improved accuracy.
- **Collaborative Transaction Management.** We provide direct access to software that streamlines the lifecycle of every transaction. Our team spends an average of 30 percent less time per transaction by eliminating manual, often administrative, transaction-related processes, such as coordinating execution and generating closing books.



## consultation

Drawing upon our expertise to solve challenges in partnership with our clients and support their efforts to effect change; leverage data, assets, and intellectual capital; re-imagine workflows; manage risk; and research and implement scalable solutions.

### EXPERTISE

Our clients require sophisticated advisors with complementary experience in various disciplines. Co-Founders Mark Young and Tilly Gray bring decades of practical experience to their leadership of FourLines through their respective practice experience and the management and senior leadership positions they have held at Cassels.

### PARTNERSHIP

Through the development of meaningful and informed partnerships, FourLines is invested in enhancing existing, and creating new, client relationships. Whether they are leveraging the FourLines “toolkit” or independently deploying technologies and other scalable solutions, our team has a genuine interest in ensuring that you benefit from our expertise, including with regards to the best available tools and vendors on the market.

### CHANGE

Our unique value lies in our ability to transform “out-of-the-box” technologies into the best possible user experience, either through vendor-supported customization or seamless integration with other workflows or technologies. A deep understanding of the tools deployed, combined with the demands of practicing law, have resulted in the creative use of these tools – elevating their capability beyond their original purpose.

## REPRESENTATIVE OUTCOMES

- **Strategic Growth.** Our clients are under pressure to optimize processes, people, and technologies, while navigating day-to-day challenges related to business growth. We have partnered with our clients to develop and implement strategic plans related to their legal operations teams and related functions, allowing them to focus on the successful operation and growth of their businesses.
- **Technology Audit/Roadmap.** An analysis of how technology can support an organization's business strategy and priorities is essential. We have assisted clients with prioritizing, process mapping, and planning for near- and long-term technology implementations, providing recommendations related to vendor reputation, maturity of tools, potential integrations, and identification of redundancies.
- **Tools to Facilitate Working Remotely.** Our team developed a series of communications to support businesses working remotely, highlighting features of existing and no- or low-cost applications that, among other results, boost productivity, reduce paper, and improve collaboration.