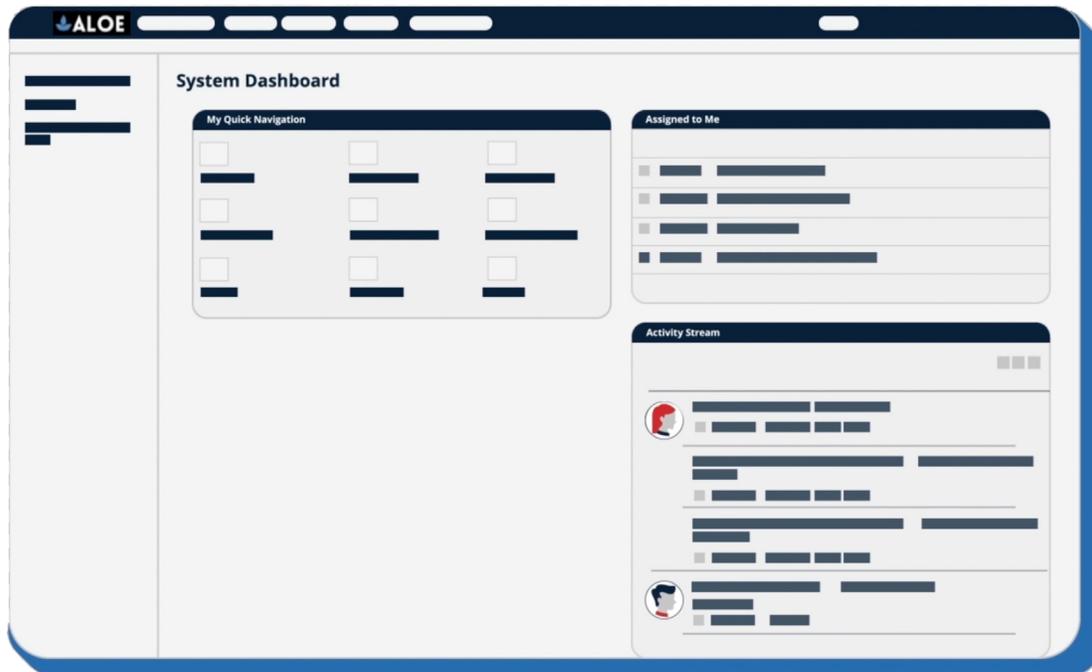


Effective Project Management Software for Your Business



**Stay Organized With
Effective Business Automation**

“The average employee loses 9 hours per week looking for things.”



In-House Counsel’s software is clunky and is not as efficient as it could be. ALOE™ solves those problems. It was designed by attorneys, for attorneys who want to save time and avoid risk.

ALOE contract lifecycle management and project management simplifies your processes and lets you focus on the projects that matter most.

Working within an organization requires strong communication and project management skills to ensure your company’s deliverables reach their destination on time. That’s why we created the ALOE software to build more seamless collaboration across departments.

Outdated administrative tasks can bog down workflow processes, waste valuable time and negatively impact profits. When business automation is prioritized within your organization, you’ll see a gradual increase in productivity and an improvement in your staff’s overall quality of work.

ALOE™ Features



Contract Lifecycle Management



Project Management



OCR Document Storage



Personalized Security



Easy Adoption



Email Integration



Capacity Planning



Project Management



OCR Document Storage



Contract Lifecycle Management



Automated Workflows



DocuSign Integration



Stay Organized



Mobile + Email Approvals



Robust Reporting



Risk Reduction

**ALOE is Constantly
Improving & Adding!**



Inline Editing

Why Is Business Automation Important?

Better Business Automation Saves Time and Drives Revenue

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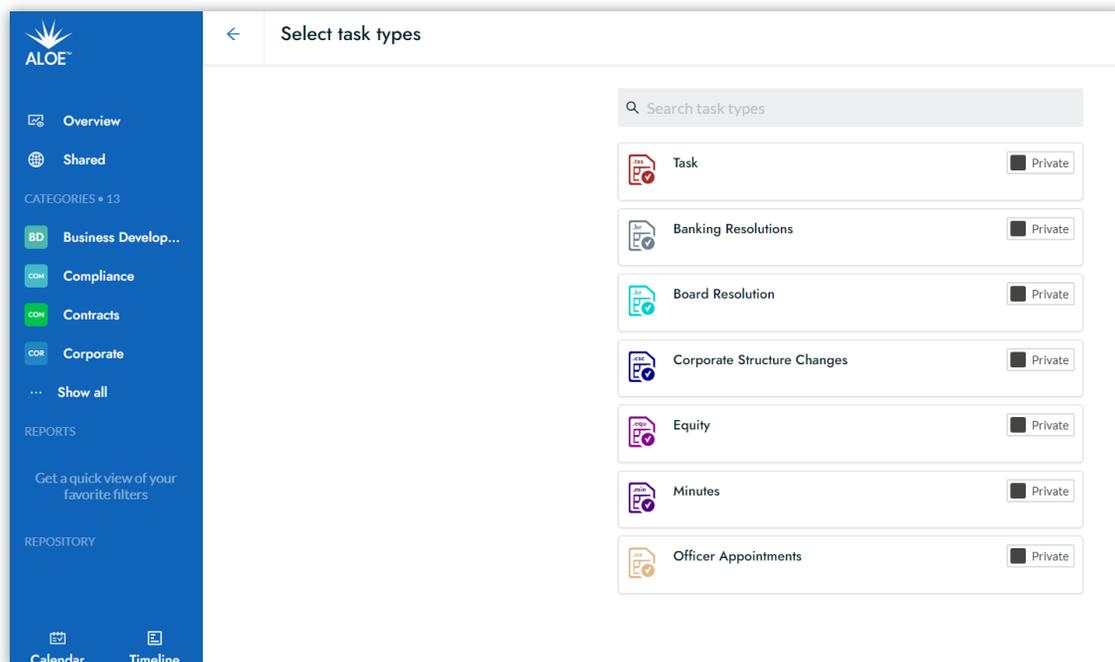
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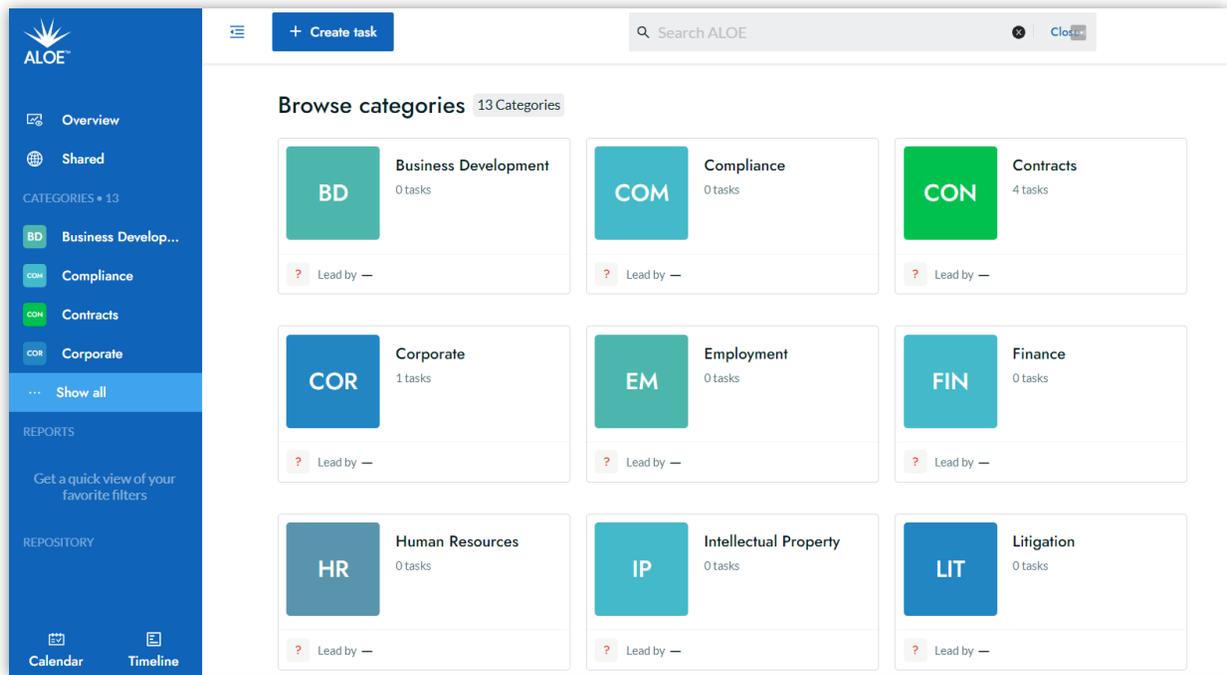


software to build more seamless collaboration across departments.

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Create Automated Workflows



Some organizations rely on manual workflows to guarantee total quality assurance and thorough communication. With ALOE, you have the opportunity to reshape some of this process into more automated workflows. This level of business automation is not only good for your business as a whole, but it will also provide your employees with more flexibility and opportunities for growth on higher-value projects.

Simple and repeatable intake creates efficiencies in collecting information from internal customers while providing a simple audit for requests pending, incomplete request, and completed work.

Simple and repeatable intake creates efficiencies in collecting information from internal customers while providing a simple audit for requests pending, incomplete request, and completed work. Workflows can be a very useful tool when it comes to tracking contracts. They can set alerts, provide stakeholders with options for moving forward, and automate next steps based on choices made by stakeholders.



Better Project Management for Your Team

ALOE Standard was built so that teams can simply get started managing their contracts online. It provides a collaboration space for your team, reporting capabilities, and a secure central repository for completed contracts. Contract- and matter-specific fields are included, and project workflows help you see where your work is at-a-glance.

For some organizations, ALOE Standard is all the technology they need. It's a simple, inexpensive solution for a single attorney or a small team and offers features that they would otherwise not be able to afford.

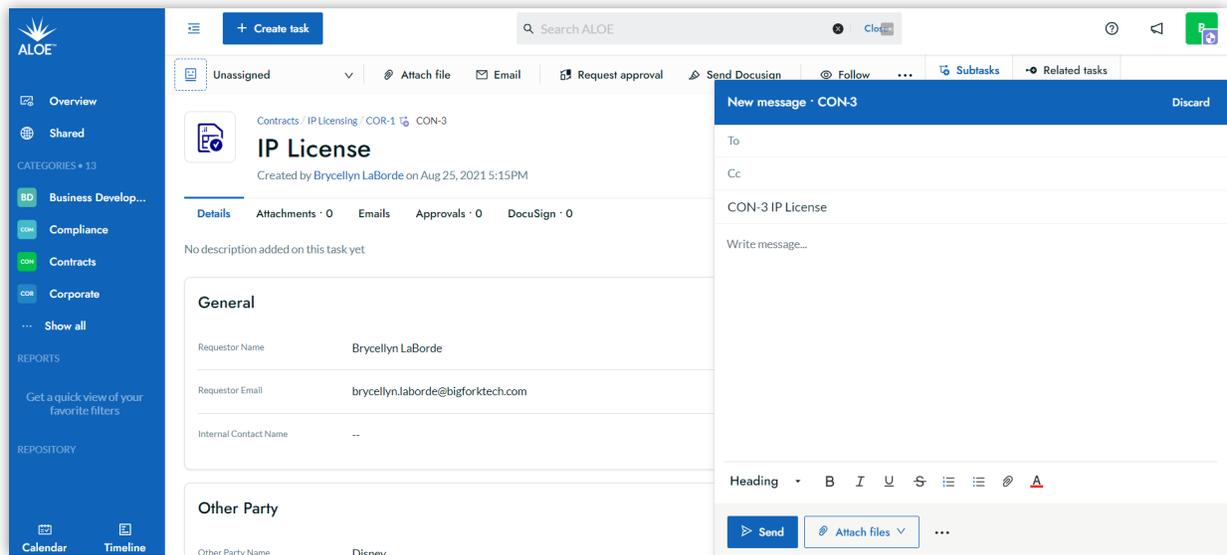
For other organizations, ALOE Pro is a better custom solution to address specific internal customer and legal team pain points. ALOE Pro has

tools like custom automated workflows, custom reports, intake forms, Gantt timelines, customizable issue types, customizable fields per issue type, and training all designed to create personalized solutions for you. ALOE also allows you to control by category who can view, create, edit, or delete tasks, new categories or repositories. Permissions set will carry through to other functions like reports.



A screenshot of the ALOE Standard software interface. The interface is divided into several sections. On the left is a blue sidebar with navigation options: Overview, Shared, CATEGORIES (13), Business Develop..., Compliance, Contracts, Corporate, Show all, REPORTS (with a sub-note: 'Get a quick view of your favorite filters'), and REPOSITORY (with sub-options: Calendar, Timeline). The main content area shows a task titled 'NDA - Sky Saddles' under the category 'Contracts / NDA / CON-1'. It was created by Tanya Avila on August 09, 2021 at 8:40AM. The task details include: Due Date: August, 31 2021; Requestor Name: Joe Smith; Requestor Email: joe.smith@email.com. There are 1 attachment, 0 emails, 0 approvals, and 0 DocuSigns. The right sidebar shows 'Subtasks' (0 completed out of 0), 'Related tasks', 'Description', 'Field groups' (General, Other Party), 'Comments' (1 comment by Brycellyn L. 14 days ago: 'Test comment / Test email notification for follow'), 'Work Log', and 'History'. The bottom of the interface has an input field for comments and a 'Toggle attachment' checkbox.

The Benefits of Email Integration



1. Reduce Emails, Save Time
2. Real-Time Transparency
3. Data Integrity

The average office worker receives 121 emails each day. This takes an enormous amount of time each day, and email interactions are not always lucrative or informative. Email integration can reduce the number of emails attorneys receive by keeping the information in a central location, so only the main point of contact need be copied, or through various other means.

CLM email integrations make transparency easy and immediate for your team (visibility is managed within your system so that only those who have clearance to see

certain contracts or matters have access). This makes meetings, collaboration, and coverage much easier. Covering a team member while they are on vacation or unexpectedly out of office is much simpler with these tools.

The best ways to ensure accurate data collection and retention is to make intake as easy as possible. CLM email integrations place data collection practices directly in an attorney's workflow so that, with extremely small changes to their day-to-day interactions, conversation history, document versions, decision-making, approvals, and more are all logged in a central location with all the needed details retained.

Email Approval

Email templates make approval easy. Send an email to the desired approver (internal or external) with the information necessary for them to assess along with buttons that trigger a workflow response.

Email approval increases work efficiencies by eliminating additional steps that can lead to user error.

Email Notifications

Receive notifications when tasks are assigned or modified to stay

updated. This feature also applies when users are tagged as a collaborator on a ticket.

Any user can email from a task ticket to internal/external email addresses. Automations include templated emails that have fields, comments, and/or attachments as options. The email sent will be added to the ticket for tracking by all collaborators. Any reply to that email will be automatically added to the task ticket, including any attachments.

The screenshot shows an email approval template in the ALOE system. The header includes the ALOE logo and the sender information: "Blue Ivy Real Estate" and "To: Tyrone Rose tyrone.rose@bigforktech.com". The subject line is "BD-1 Prepare patent application for SledgeHammer™ super long overflowing title". The body of the email contains several sections: "Fund Raise Goal: \$3,450,000", "Fund Raise Total: \$3,450,000", "Keypoints / Messaging: Hello Tyrone, We need you to clear this real estate purchase.", "Title: Blue Ivy Park", "Type of IP: Sean Carter, LLC.", and "Vendor Used: Universal Music Group". At the bottom, there are two buttons: "Approve" and "Reject".

The screenshot shows a task ticket in the ALOE system. The header includes the ALOE logo and the search bar. The task title is "Blue Ivy Park" and it was created by Tyrone Rose on Dec 09, 2021. The task status is "Pending". The task details show an approval request from Tyrone Rose, with the message "Hello Tyrone, We need you to clear this real estate purchase." and a "Require at least one" option. The right sidebar shows the task details, including the status "Pending", the email body, and the recipients list, which includes Tyrone R. sent an approval request 1 Pending. There are also buttons for "View workflow" and "View info".

In order to know where responsibility falls, you'll need well-documented processes. By outlining what needs to be done and which persons or teams are best suited to accomplish each task, employees have a resource they can refer to for instructions on how to complete a task and where they fit in to the flow.

Documents In ALOE

DocuSign Integration

Send DocuSign
Contracts / CON-1

Prepare documents for recipients to be reviewed and digitally signed.
Fields mark with asterisk [*] are required.

Powered by **DocuSign**

Title*

RECIPIENTS

Sequence approval
Lets you control the order in which your recipients receive and sign your documents

Off Set signing order

Email* Recipient*

Remove
[Add recipient or Select emails related to task](#)

Message
Add a brief description about this request

Attachments
Completed DocuSign are saved to:
Select target location...
+
Add attachments

ALOE allows you to send documents for signature through DocuSign in a user-triggered or automatic signature request. This seamless integration brings the signed document back into your task ticket.

Docu-edit

Edit your word documents directly from ALOE. Track versions and make sure everyone is working from the same version at all times without downloading/uploading or working from desktop drafts.



Allow ALOE to edit this file

To edit this file directly please follow the steps below:

- ✔ Install ALOE docu edit monitoring app (Skip this step if you already installed the monitoring app).
- ✔ Open the file in your computer
- ✔ Make your changes in the file
- ✔ Click on Save icon
- ✔ Click Publish to reflect the changes you made in the file

Publish

Cancel

For Signatures
1 files • Last modified Nov 29, 2021

Add file
Upload new file under this folder

Independent ISO Agreement_2021 PS rev 08132021.docx
Added about 1 month ago by Tanya A.

Download
Edit
Move to... >

Executed
1 files • Last modified Nov 29, 2021

Add file
Upload new file under this folder

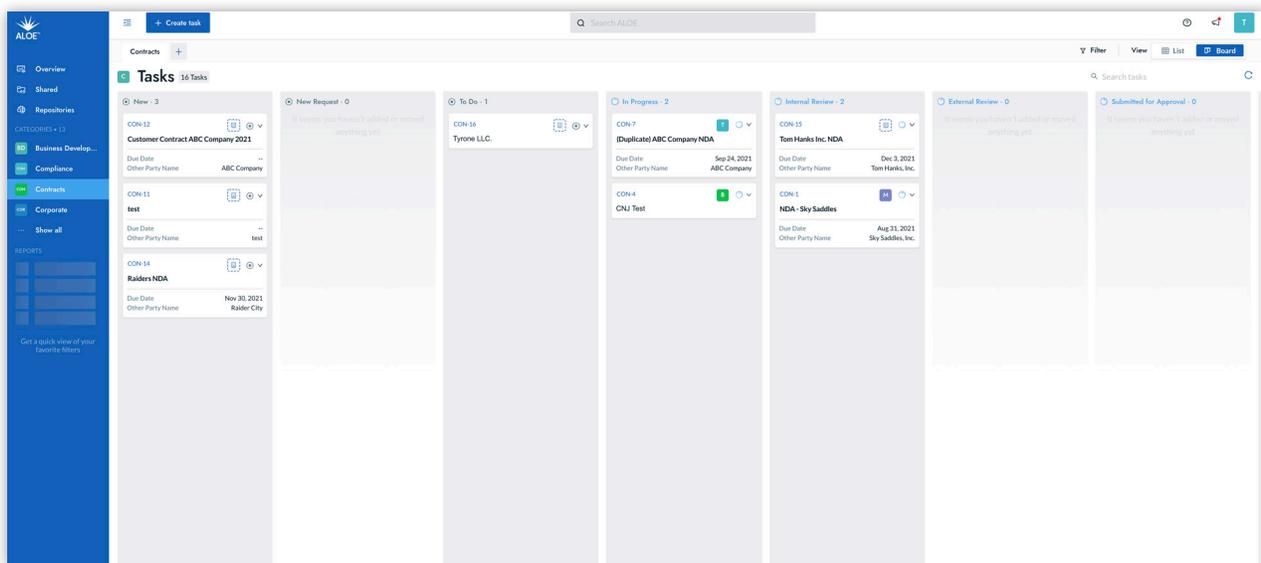
Bigfork Tech Website 2 Content.docx
Added about 1 month ago by Tanya A.

Data Visualization Tools

Board/Kanban View

The Kanban view is a popular management tool to determine which stage an item is in. As shown in the columns below, the status of an item on your to-do list is visible in the related column. You might even create rows for each member on your team so you can see if 1 team member has all their items sitting in review while another hasn't even begun working on their assignments.

“Tools can help you parse numbers and data, but it's visualization that'll help you get others to understand your conclusions.”



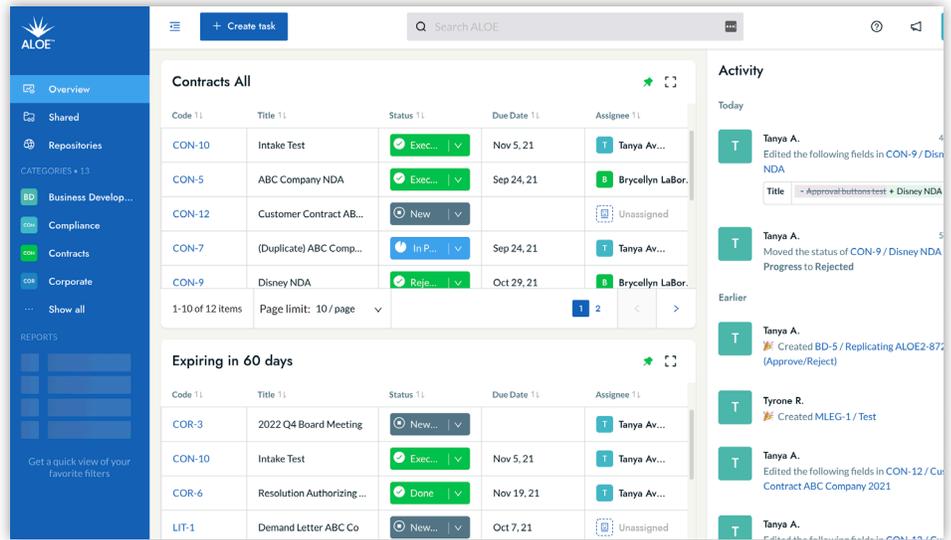
It should be noted that the columns for these types of boards can change based on the type of work you are doing. The image shown shows a standard list of columns for contract management, but these can be altered to manage matters, HR projects, or blog posts.

A kanban board is a project management tool designed to help visualize work, limit work-in-progress, and maximize efficiency or workflow.

Dashboards

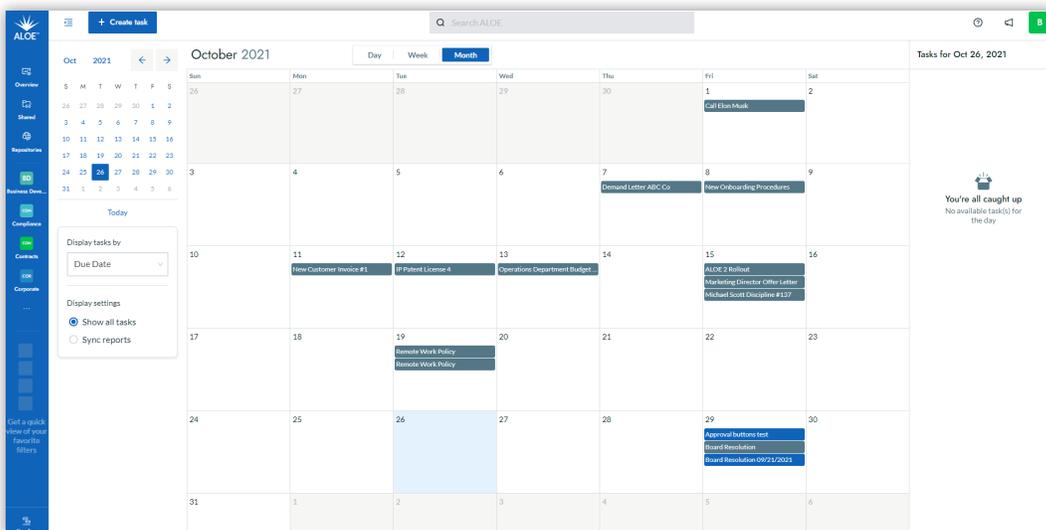
Outdated reports make planning challenging, and when managing a larger team, the status of projects and items can change quickly and constantly. Additionally, for busy teams, manual reporting processes require time that these team members just don't have.

Dashboards resolve these pain points. By providing up-to-the-minute reports – that are meaningful to the leaders and members managing the work, you can adapt your plan as-needed and keep your team's efforts focused on the work that matters.



Calendar views in management software shows start and end dates for the items on your to-do list, shows how they interrelate with other members of your team, and gives you an easy-to-see to-do list for the day. This helps with prioritization and keeping your team on track.

Additionally, calendars might be used for specific types of work, like a PTO tracker, tickets in a specific project, a contract expiration/renewal calendar, and more. Using filters on your calendars can focus that view on the exact information you know in order to successfully manage your work.



“If there’s a field, we can track it and report on it. Reports can be shared internally or externally via email.”

Reports

The very act of checking your department’s numbers over time will lead to an additional performance boost. With ALOE, pulling and analyzing reports is easy.

ALOE provides you with a wealth of data to inform your decisions. Your star performers, most-discussed projects, client approvals, and the latest revisions to agreements will all be a click away. Actionable data

is instant and requires no extra participation from your co-workers other than simply doing their work.

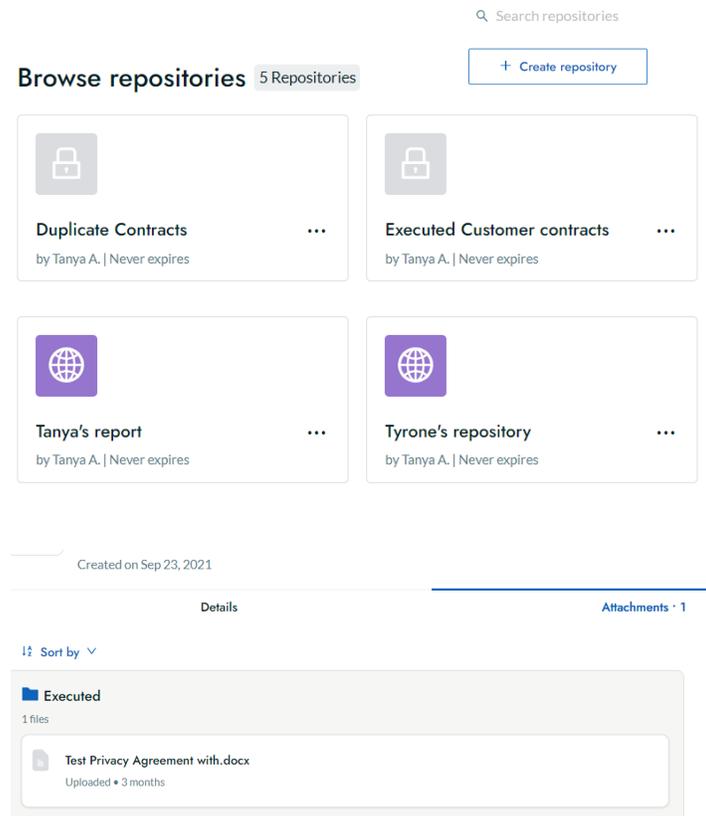


Repositories

All ALOE task tickets and attachments are stored in your general ALOE repository and are completely searchable. With our upgraded repositories, you can create special-purpose repositories that contain a subset of ALOE task tickets and attachments, share those repositories with licensed or unlicensed users. You can also limit which fields are viewable in the public repository, along with determining how the repositories are available.

Intake form

Non-licensed users can request work by completing an intake form. You control which fields are required for submission.



What are you interested in learning more about?

ALOE
Project Management Software Tools
Administrator Training
Contract Management Software
Software implementation Services
Pricing
Something Else?



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Don't hesitate to reach out www.bigforktech.com/contact-us