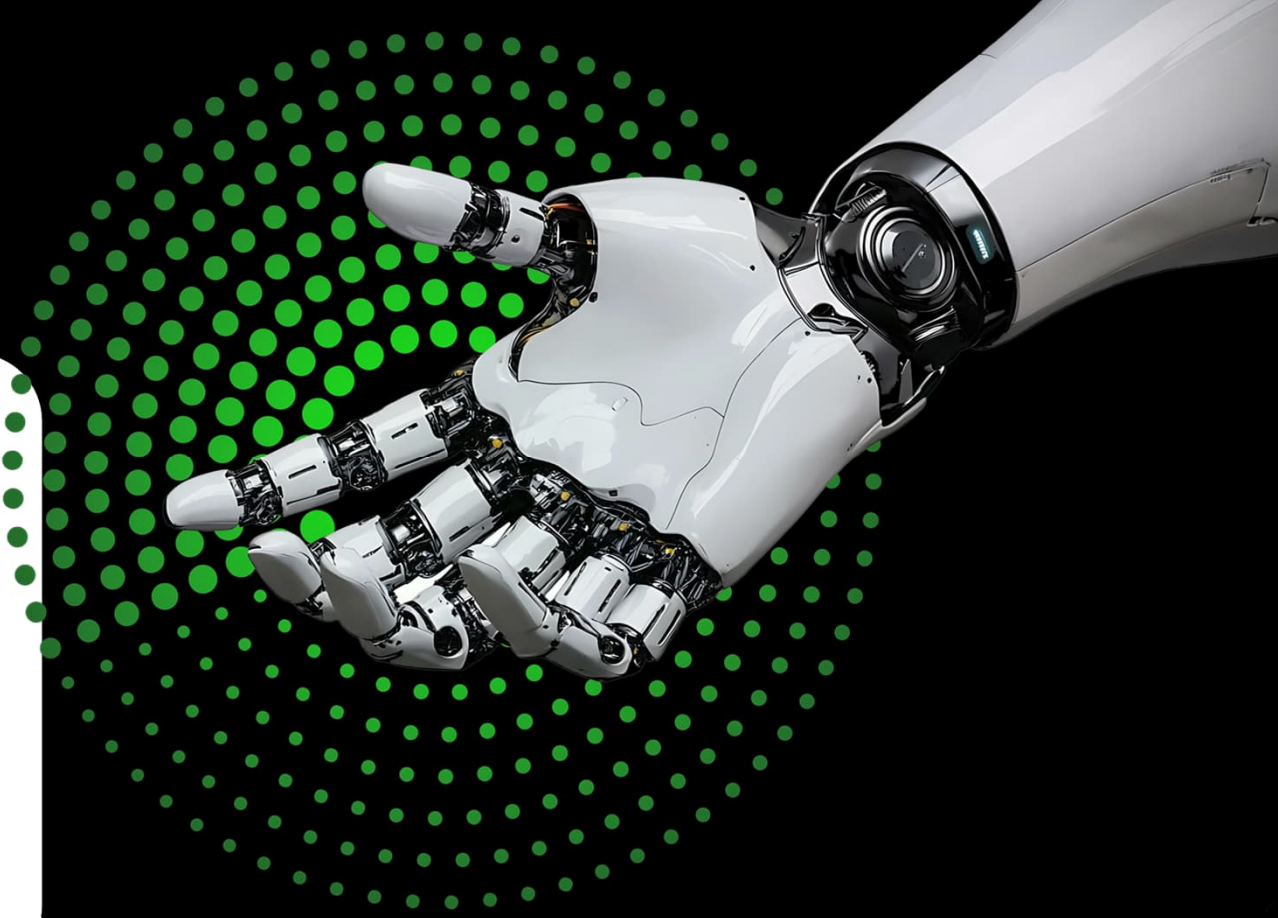
Deloitte.

In association with **Checkbox**



Establish the right legal operating system for your legal teams

Together, Deloitte and Checkbox help in-house legal teams transform their operations with a legal-focused operating system and omni-channel front door that allows them to see, triage and monitor the business of legal.

Legal Departments have many applications but rarely a solution that allows them to answer the most basic operational questions such as what work is coming in and from where, who should handle it, could it be self-service or automated and how can we plan for the demand.

Solving this problem using a Legal Operating System that meets stakeholders and teams where they interact, email, Teams, chat, and intranet sites allows the ability to unify Legal work without the disruption of adopting a singular process or channel.

Through this alliance, the Deloitte Legal Function Transformation team and Checkbox set organisations up with the platform to not only establish this capability but put the ongoing adaptation of these tools in the hands of the legal team itself.

Deloitte.

CHECKBOX + DELOITTE

Deloitte and Checkbox have been working together since 2021 successfully helping many clients solve legal, compliance, procurement and operational challenges and establish well-adopted technology that legal teams and their stakeholders can support.

Checkbox

THE AI OPERATING SYSTEM FOR LEGAL TEAMS

As legal teams grow, requests multiply across channels — a lack of structured intake leads to a loss in visibility, prioritisation, and accountability.

Checkbox provides in-house legal teams visibility and control over all legal work. Capture and service requests from every channel, power self-service with AI, and deliver measurable impact on the business.

No IT, no forms, faster adoption, Checkbox AI works behind the scenes to reduce manual effort and improve visibility across legal work. Centralise requests from Slack, Teams, email and more. One connected platform - without extra steps.

Track demand, cycle times, and workload distribution in one place and make better decisions with data. Strengthen legal's credibility across the business.

Deloitte and Checkbox

One team to deliver outcomes for legal teams

Together, Deloitte Legal Function Transformation and Checkbox guide organisations to design and build their own legal operating system through a shared model of use case discovery, co-design and co-build, change management and training activities.

We focus on getting clients self-sufficient and confident, ready and able to leverage the benefits of the Checkbox platform in their business including co-design, training, change management, configuration – including integration, guidance and target operating model. Together we have extensive capabilities and experience in deploying and using Checkbox to full effect, allowing organisations to choose the right balance of self-sufficiency and capability and support.

Together, we:

Transform your legal operating model - Assist your business to leverage the opportunities of a Legal Operating Technology through operating model, change management and process optimisation.

Leverage Experience with Best Practice Use Cases - Assisting in developing and assessing Checkbox use cases to make strong choices that use the platform to full effect leveraging the experiences of others for best practice.

Assist with Technical and Support - Providing expertise to assist you to use the platform well and provide input about technical and challenges you need to overcome.



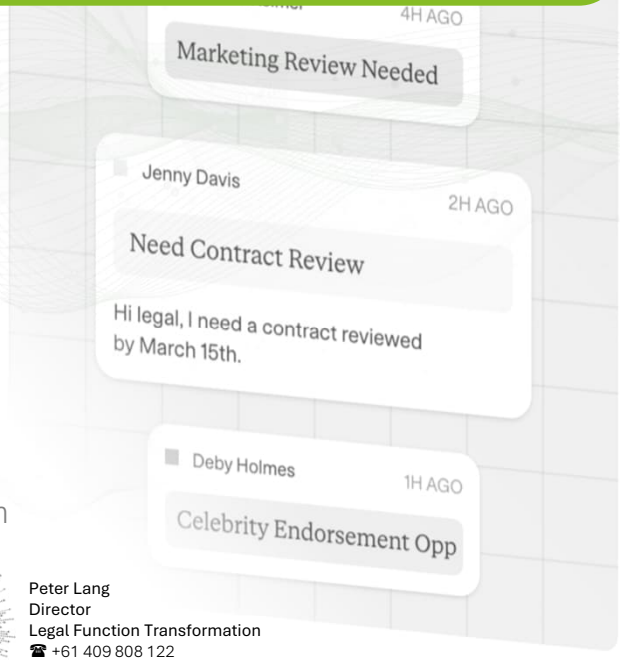
Provide a Scalable and modern SaaS technology - Provide you with an intuitive and agile platform to manage your legal operations needs from intake, triage through to workflow and matter management.

Embed capability - Establish a pathway to self-sufficient Checkbox advocates with fun and relevant training and capability activities, setting capability base level within your organisation to feel comfortable building your own applications, intake and matter boards.

Support with Resource Augmentation - Ensuring your business always has the capability and capacity as needed to ensure the technology is not just set and forget for today, but adaptable and valuable into the future.

Our joint services make implementing and using Checkbox easy:

- Legal Operating model
- Use Case Prioritisation and Return on Investment calculation
- Co-Design and Co-Build activities
- Change & training
- Checkbox implementation
- Workflow and Integration Support and Guidance
- Checkbox resource augmentation
- support and community activities
- Platform deployment and security design and provisioning
- Customer Success Support Activities
- Platform maintenance



Case Study – Legal Invoice Review - Banking

Issue : A client was facing challenges with external legal spend, including fragmented invoicing processes, limited visibility of spend and budgets, inconsistent enforcement and weak metrics. They wanted to assess invoice review methods and analyse historic spend using LEDES data to identify trends and introduce improvement opportunities.

Solution : Deloitte rapidly mobilised a team assessing $23 million of legal spend in five weeks using an established review methodology and data-driven analysis. Spend data was ingested into the Legal Invoice Review Tool to validate findings, identify non-compliances risks, and accelerate issue detection, reporting, traceability and oversight using AI.

Impact : The review identified $1.9 million in potential savings, 8% of reviewed spend, with up to $7.5 million in broader savings potential. The review identified improvement opportunities across firms were identified and insights on AFAs, T&M billing, share of wallet and non-compliance cases. AI-assisted review on turnaround times, accuracy and interactions was evidenced with ability to analyse high-volume invoices without manual data handling and reporting.

Case Study – Agreement Review Workflow – Public Sector

Issue : A state government organisation required a scalable, secure workflow and document generation solution to manage a high-volume review program across multiple stakeholder groups for agreement review. Fragmented processes and complex access requirements across internal teams and external providers made it difficult to efficiently manage over 5,000 agreement reviews and generate compliance documentation.

Solution : Deloitte implemented a Checkbox no-code workflow and document generation platform to centralise and automate the end-to-end process. The solution enabled role-based access control across organisations, secure data handling aligned to government standards, and automated routing, review workflows, and document generation. Training and support ensured adoption across internal s and third-party providers.

Impact: Delivered a scalable, secure and flexible solution capable of supporting high-volume agreement review management and compliance document generation. Enabled multiple stakeholder groups and s to efficiently review over 5,000 agreements, significantly reducing manual effort and processing time. Improved traceability, data visibility, and reporting, with outputs integrated into downstream analytics, and strong adoption across stakeholders.

Get in touch



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