

# Power Platform for Legal

Formalize matter intake, conflict checks, and approval workflows with documented digital processes that hold up to any audit.

## EXECUTIVE SUMMARY

Your matter intake, conflict checks, approval workflows, and client communications move through email, shared drives, and manual checklists. Processes vary by partner. Documentation is inconsistent. When a regulator or insurer asks for an audit trail, you may not have one. Power Platform formalizes your legal workflows with digital forms, automated routing, and documented audit trails.

## THE BUSINESS PROBLEM

Law firms and legal departments manage sensitive processes through informal channels. Matter intake varies by partner. Conflict checks happen via email. Approval workflows exist in someone's memory. When processes are not formalized, they are not auditable, they are not consistent, and they cannot be scaled or transferred to new staff. Bar regulators and malpractice insurers are specifically looking for these gaps.

## HOW ARMELY SOLVES IT

Armely helps your firm **reduce compliance exposure and enforce consistent matter governance** by using **Power Platform** to replace email-based conflict checks and informal intake processes with structured digital workflows that route automatically, apply matter-level access controls, and produce a complete, time-stamped audit trail for every action.

## BUSINESS OUTCOMES

- Reduce matter intake processing time by **50%**
- Enforce ethical walls automatically through built-in access controls
- Create a complete, time-stamped audit trail for all matter-related approvals
- Reduce conflict check time from days to hours
- Achieve consistent process documentation across all practice groups

### Industry Scenario

#### **Conflict Check Workflow — Regional Law Firm**

*A regional law firm replaces its email-based conflict check process with a Power Apps workflow. New matter intake time drops from three days to four hours. The compliance team has a complete, time-stamped audit trail for every conflict check. When the firm's malpractice insurer requests process documentation, the response takes 10 minutes instead of three weeks.*

## WHY THIS MATTERS NOW

Bar regulators and malpractice insurers are scrutinizing process documentation. Remote work has made informal workflows more fragile and harder to audit. Firms that cannot produce audit trails for matter intake and conflict processes face both disciplinary and liability exposure. The firms that address this first will have a compliance advantage that resonates in enterprise client conversations.

## RECOMMENDED NEXT STEP

**Schedule a matter intake and conflict check workflow review with your general counsel or firm administrator this week.** If you want Armely to run that review with you, contact us at [info@armely.com](mailto:info@armely.com) or **972-460-0643**. We can turn around a findings report within **5 business days**.