

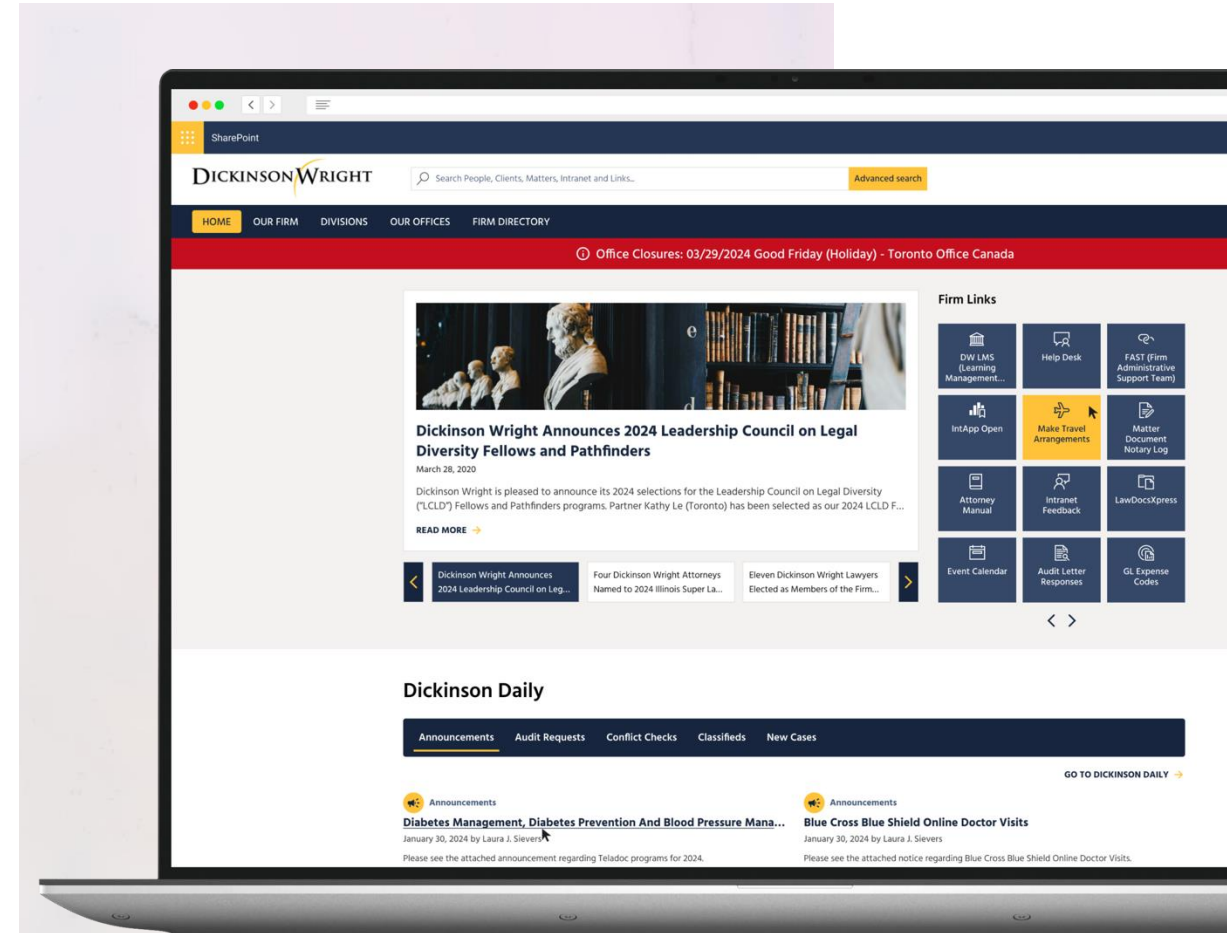


www.klstinc.com/whyklstforlegal



# How Dickinson Wright uses Gen AI-Powered Intranet Search and Chatbots to Simplify Attorneys' Daily Work?

Dickinson Wright PLLC uses Generative AI inside their SharePoint Portal





1

## Jadin Tredup

### Senior Data Scientist

- Working with **Dickinson Wright** since **2024**
- Electrical engineer researching ML and LLMs
- Leading firmwide AI strategy and integrations
- Published papers on on-prem LLM & low-cost hallucination detection topics

[JTredup@dickinsonwright.com](mailto:JTredup@dickinsonwright.com)

[linkedin.com/in/jadintredup](https://linkedin.com/in/jadintredup)



2

## Ragav Jagannathan

### President & Group CEO –

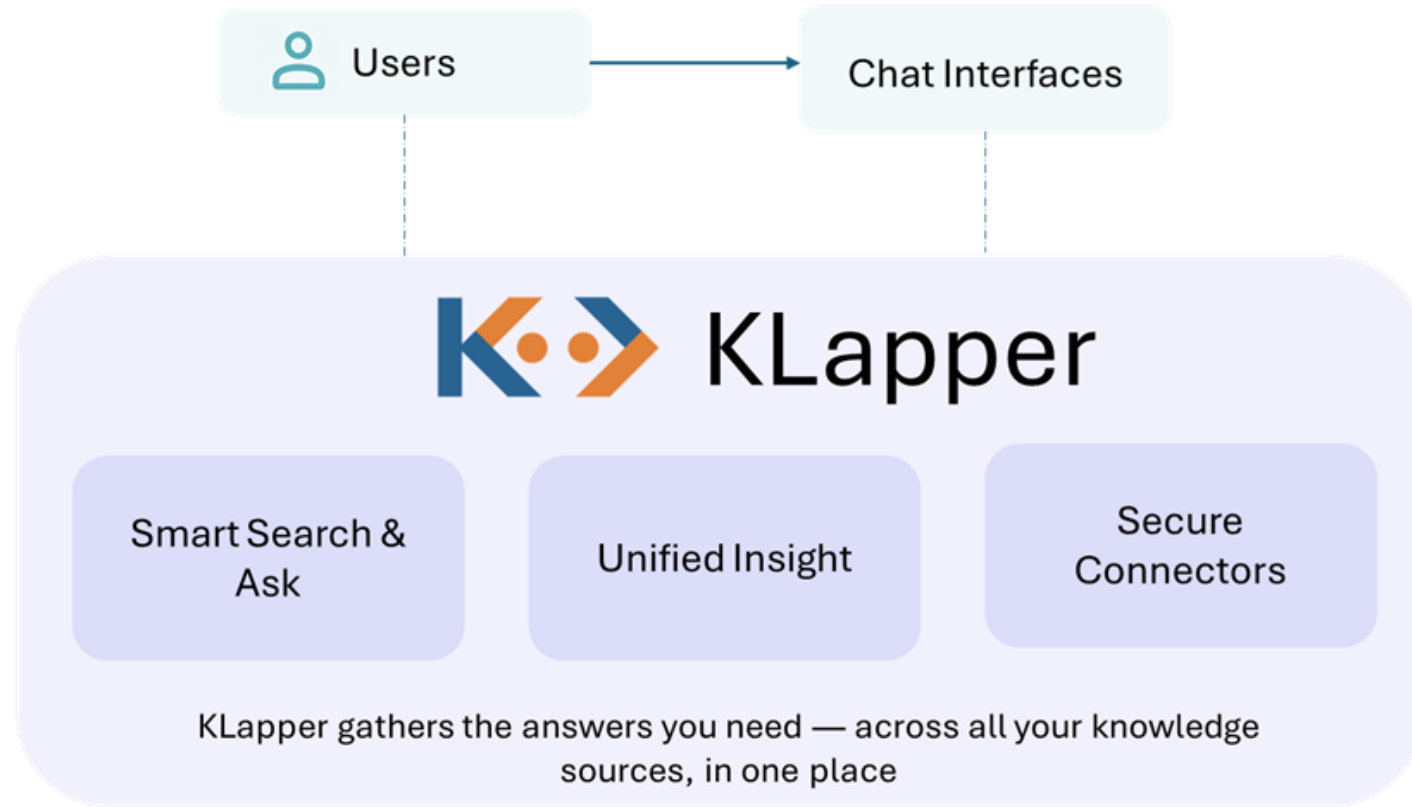
**KLST** – SharePoint & CoPilot Specialists -  
[www.klstinc.com/whyklstforlegal](http://www.klstinc.com/whyklstforlegal)

**KLoBot Inc** – M365 & NetDocuments / NetDocs integration  
Specialists - [www.klobot.ai](http://www.klobot.ai)

[ragav@klstinc.com](mailto:ragav@klstinc.com)

[linkedin.com/in/ragav](https://linkedin.com/in/ragav)

# KLapper – Private AI, Secure AI, Ethical AI platform



Connect Once. Access all your system securely.





# Michael Kolb

Chief Operations Officer

“Our AI-powered intranet delivers measurable operational improvements by centralizing access to all firm tools and institutional knowledge in a single platform, enabling our teams to operate more efficiently. This unified approach ensures consistent access to resources across all offices and practice groups. By putting powerful AI capabilities powered by KLapper at everyone’s fingertips, we’re driving productivity gains that directly impact our bottom line while improving the day-to-day experience for our entire workforce.”

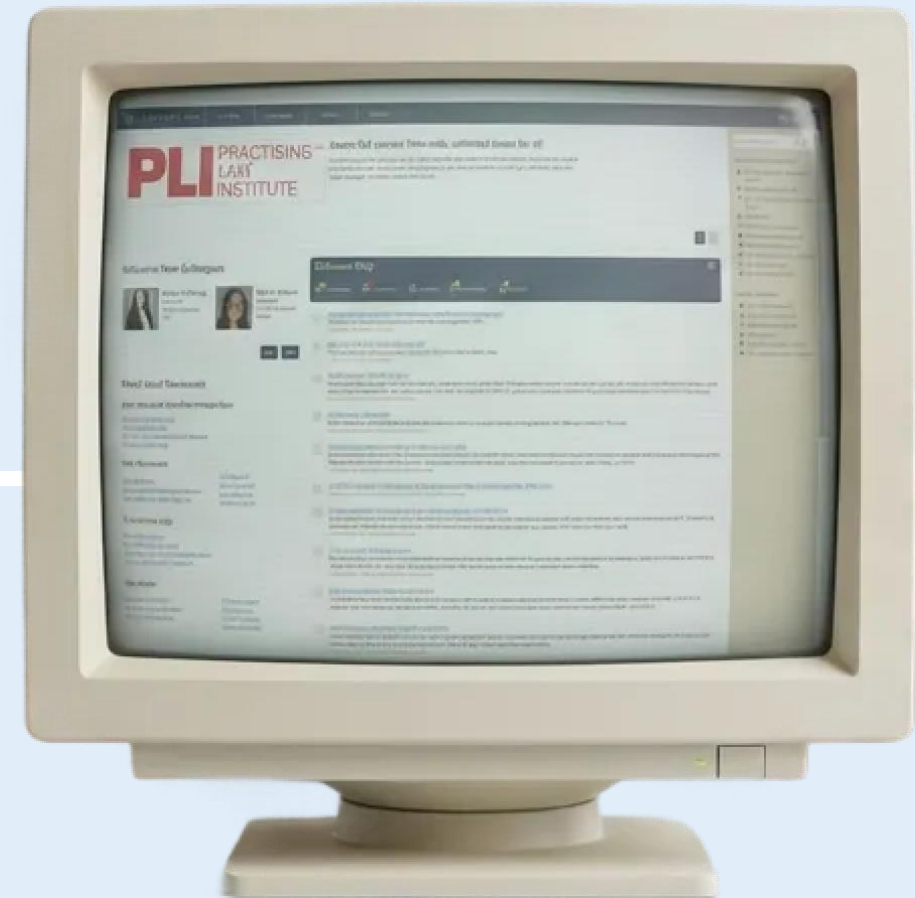
The screenshot displays the Dickinson Wright intranet interface. At the top, there is a navigation bar with the company logo and a search bar. Below the navigation bar, there are several menu items: HOME, OUR FIRM, DIVISIONS, OUR OFFICES, and FIRM DIRECTORY. A secondary navigation bar contains icons for New, Promote, Page details, Preview, and Analytics. The main content area shows a document viewer for "Accounting Manual.pdf" with a table of contents on the left and the document content in the center. The document content includes sections on "Confereces/Meetings/Seminars" and "Dues & Licenses". On the right side, there is a "Prod Assistant" chat window with a message about "Personal dues as outlined in the documents include:" followed by a list of dues categories: State Bar Annual Dues, Local Bar or Professional Association Dues, and Additional Local Bar or Professional Association Dues. The chat window also includes a "Write your message..." input field and a "Content generated by AI may contain inaccuracies" disclaimer. At the bottom of the page, there are two buttons: "Intranet Feedback" and "Contact us".

# Challenges and Objectives

## The Limitations of Legacy Systems

The transition from the legacy "DW Connection" portal to a modern SharePoint Online solution was necessitated by several critical infrastructure and usability issues.

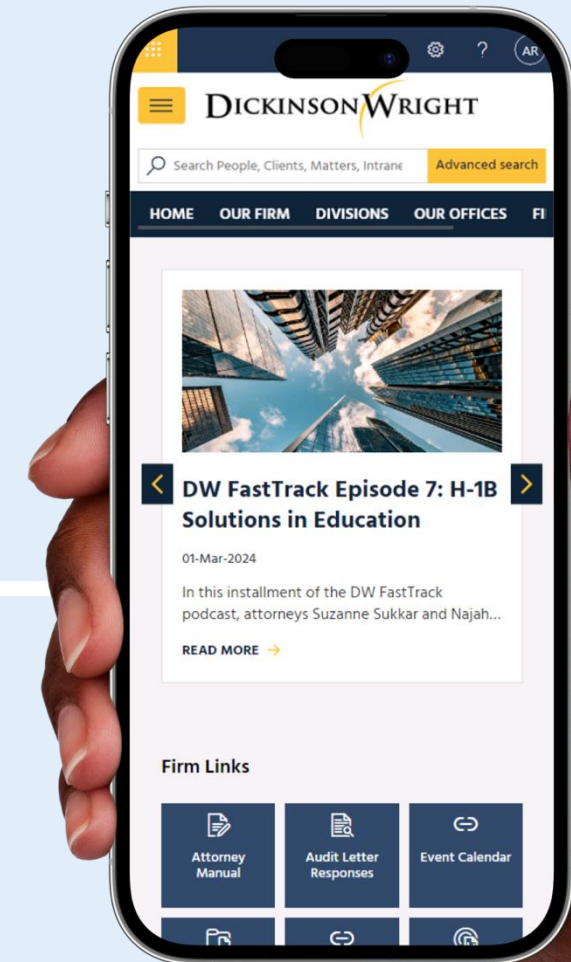
- **Infrastructure & Accessibility:** The firm relied on **SharePoint On-premises**, which used classic page layouts that were **not responsive**. This made reading and interacting with content on mobile devices or smaller screens extremely difficult.
- **Navigation & Branding:** The user experience was fragmented, with inconsistent application of firm branding and navigation that was often unintuitive.
- Furthermore, attorneys faced "**information overload**," where there was simply **too much data for humans to parse through manually** in a timely fashion
- **Finding specific firm expertise** – such as an IP professional who speaks **Mandarin** in the **New York office** – previously required multiple phone calls, emails, and manual record searches



# Challenges and Objectives

## What drove the need for the SharePoint solution?

- The primary objective was to move all content to **SharePoint Online (SPO)** to create a centralized platform for digital collaboration and adaptive productivity.
- A key goal was the deployment of **embedded AI agents** to act as digital assistants, helping users surface relevant information from backend systems in seconds.
- **Consistency & Clarity:** The firm aimed to rebuild the "**Dickinson Daily**" app to ensure that firm-wide activity, such as conflict checks and audit requests, was presented with a clarity and consistency that was previously missing.
- **Mobile-First Design:** Ensure the entire intranet - from office pages to the firm directory - is fully functional and readable on mobile devices
- Additionally, the solution needed to provide **unified access to People, Clients, and Matters** from a single interface to eliminate the friction of navigating between disparate pages



SharePoint  
DICKINSON WRIGHT  
Search People, Clients, Matters, Intranet and Links...  
Advanced search

Now viewing search results for "all"

**People Results** VIEW MORE

- Emily R. Lawson**  
Associate Attorney, Real Estate, Division 1  
Austin  
T: (XXX) XXX-XXXX  
E: elawson@firmname.com
- Priya N. Malhotra**  
Associate Attorney, Division 2  
Austin  
T: (XXX) XXX-XXXX  
E: pmalhotra@firmname.com
- Robert A. Miller**  
Associate Attorney, Division 2  
Austin  
T: (XXX) XXX-XXXX  
E: rmiller@firmname.com
- Daniel K. Brooks**  
Legal Assistant, Legal Secretary  
Austin  
T: (XXX) XXX-XXXX  
E: dbrooks@firmname.com
- Michael J. Turner**  
Legal Assistant, Legal Secretary  
Austin  
T: (XXX) XXX-XXXX  
E: mturner@firmname.com
- Sophia L. Chen**  
Administrative Assistant, Legal Secretary  
Austin  
T: (XXX) XXX-XXXX  
E: schen@firmname.com

**Client(s) Results** VIEW MORE

- Northbridge Energy Solutions, Inc. (C-10458)
- Apex Financial Group LLC (C-11732)
- Blue Harbor Technologies (C-09214)
- Evergreen Logistics Corp. (C-13509)
- Summit Healthcare Partners (C-08877)

**Matter(s) Results** VIEW MORE

- Northbridge Energy – Regulatory Compliance Review (M-220145)
- Apex Financial – Vendor Contract Dispute (M-219872)
- Blue Harbor Technologies – IP Licensing Agreement (M-221004)
- Evergreen Logistics – Employment Arbitration (M-218993)
- Evergreen Logistics – Employment Arbitration (M-218993)

**Intranet Content** VIEW MORE

- Things To Do  
Last Modified: May 23, 2023 Author: Audrey A. Giannola
- New Employee Onboarding Checklist  
Last Modified: May 23, 2023 Author: Daniel P. Wright
- Electronic Staff Manual Acknowledgement  
Last Modified: May 23, 2023 Author: Jeffrey C. Atkins
- Local Hotels  
Last Modified: May 23, 2023 Author: Alexandra A. Pickett
- Staff Manual  
Last Modified: May 23, 2023 Author: Chester J. Holton
- DICKINSON WRIGHT RLLP  
Last Modified: May 23, 2023 Author: Ruby C. Gomez

Colleagues  
Colby L. Zurbay

# Strategic Solutions

## How SharePoint was customized to meet specific needs.

SharePoint was customized beyond standard templates to meet the specific high-stakes needs of a law firm:

### 1 Guided Search Agent

A centralized search bar was implemented that allows for natural language queries like "Give me details about client id 014705" or "When was the last payment received for matter X?"

### 2 AI Overviews

When searching for clients or matters, the system generates a concise AI Overview summarizing status, industry, last bill date, and last payment amount

### 3 Specialized AI Skills

Custom agents were developed to evaluate pricing models based on historical firm data and to assist with the client onboarding process

### 4 Configurable Webparts

Department and office pages utilize customized templates, such as calendars that automatically filter for marketing events on the marketing page while showing CLE events on the training page

AI-Powered  
Search & Matter  
Intelligence

SharePoint  
DICKINSON WRIGHT  
Give me details about client id 014785  
Advanced search

Now viewing search results for "Give me details about client id 014785"

**AI Overview** Content generated by AI. Verify key information.

Here are some details about client ID 014785

- Client Name: Northbridge Automotive Finance LLC
- Client ID: 014785
- Client Status: Active
- Industry: Automotive Financial Services (336)
- Open Date: 06/20/1991
- Client Location: Farmington Hills, MI

For additional details, please check - <https://intranet.firmname.com/clients/client-profile?cid=014705>

**People Results** VIEW MORE

No results were returned by your keywords.

**Client(s) Results** VIEW MORE

- Northbridge Automotive Finance LLC (014705)

**Matter(s) Results** VIEW MORE

- 074112-98234 | Fleet Financing Agreement Review

**Intranet Content** VIEW MORE

No results were returned by your keywords.

Dickinson Wright Announces Newly Formed India Practice | Insights |...  
February 8, 2024 by Mark Ryerson  
Please let Mark Ryerson know if you are aware of any outstanding claims or possible claimand a...

Trump Admini...  
January 30, 2024 by Lu...  
Rocket Mortgage is of...

**Firm Calendar**

Location: (my office)  
Event Type: All events

January 2024  
Events

Michael J. Turner  
Director 2 Associate Attorney  
Austin  
T: (XXX) XXX-XXXX

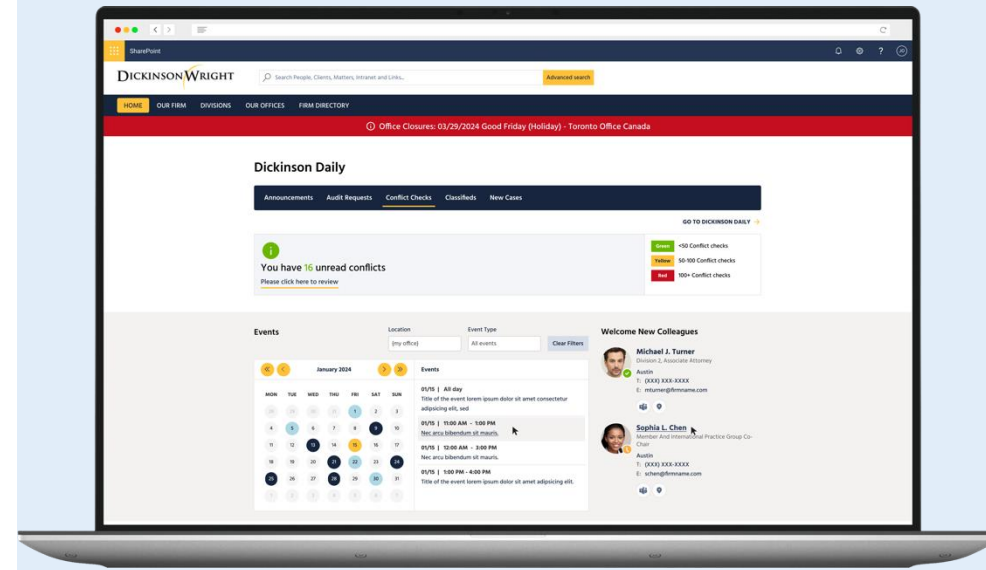
# User-Centric Design

## How SharePoint was designed with users in mind for greater engagement.

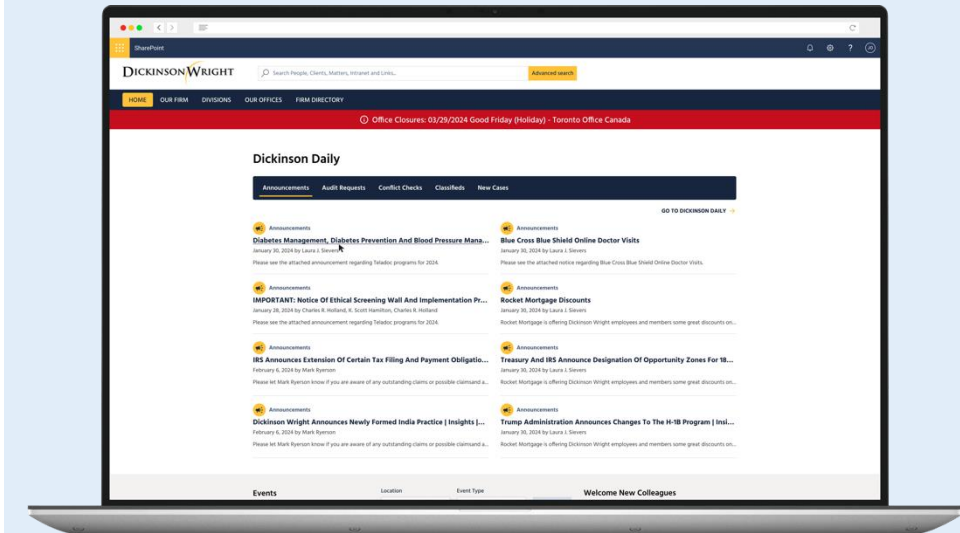
The new design focuses on **personas and audience targeting** to ensure content is highly relevant to each user:

- **Role-Based Homepages:** The site automatically adapts its view; for instance, **Attorneys** see a dashboard of unread conflict checks, while **Non-attorneys** receive a different set of prioritized tools.
- **Actionable Task Management:** The "**Dickinson Daily**" dashboard categorizes items into Announcements, Audit Requests, and Conflict Checks, with a clear visual status system (Green/Yellow/Red) for pending tasks.
- **Security-Trimmed Intelligence:** To maintain confidentiality, all AI-retrieved data is automatically security-trimmed, ensuring users only see information they are authorized to access.
- **Advanced Directory Filtering:** Users can now use configurable filters- including Spoken Languages and Bar Admissions - to find experts across the firm in seconds.
- **Mobile-First Design:** Every feature, from division rollups to office programs maps and directory search results, is fully optimized for a responsive mobile experience

### Attorney Persona



### Non-attorney Persona



# Integration Stories

## Successful integration with tools like Microsoft Teams, OneDrive, and Power BI.

Integration drives the heart of our SharePoint Intranet. We want the SharePoint Intranet to be the central hub that links to all other portals that are used in day-to-day productivity tasks and seamless integration allows this to be a reality.

1

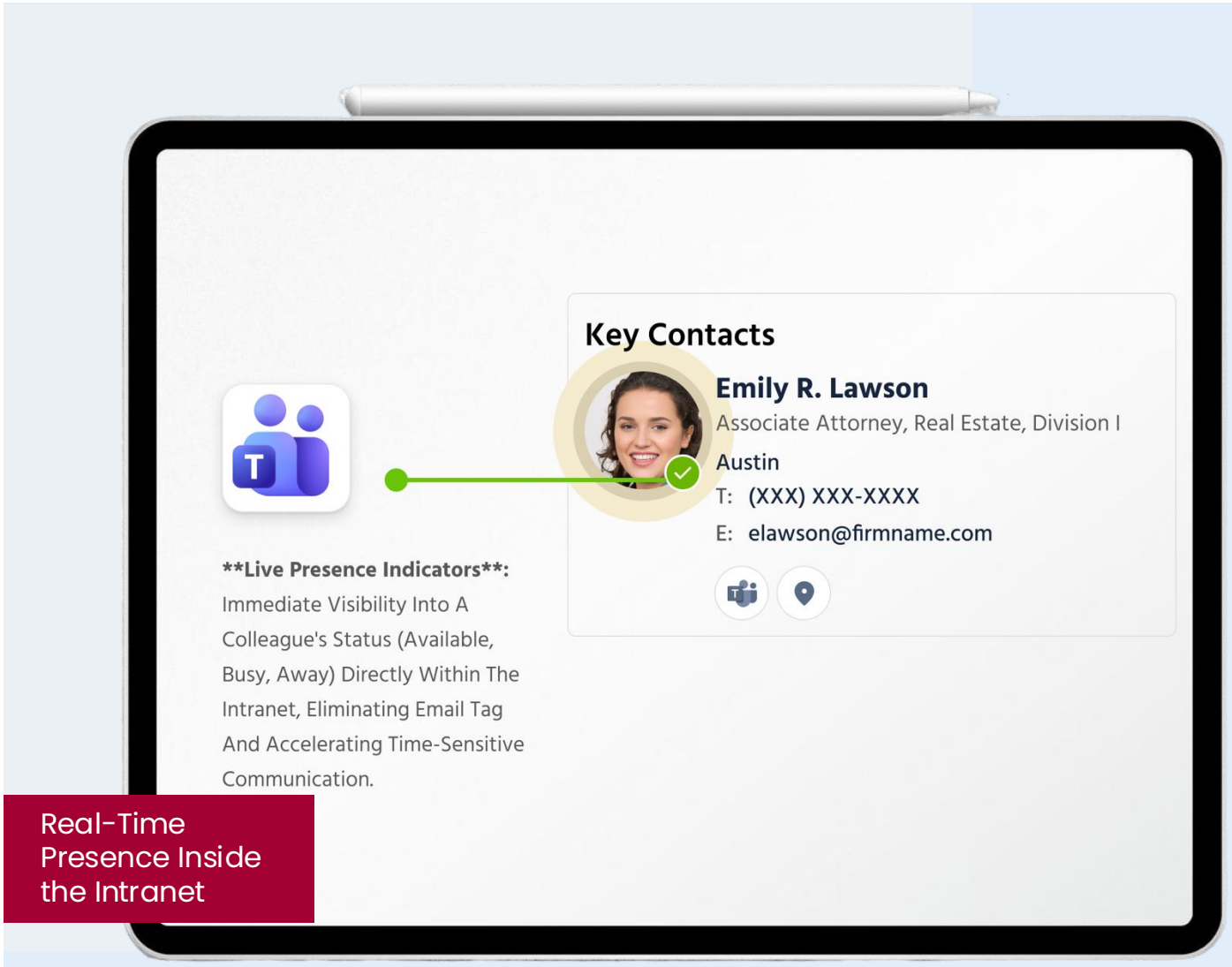
**Microsoft Teams:** Contact cards in the directory integrate live presence status, allowing users to know immediately if a colleague is available for time-sensitive correspondence

2

**IntApp Agentic AI:** Attorneys can now enter data regarding client risks, conflicts, and ethical walls through conversational chat rather than tedious forms. The AI evaluates these entries against historical data to suggest improvements and reduce rejection chances

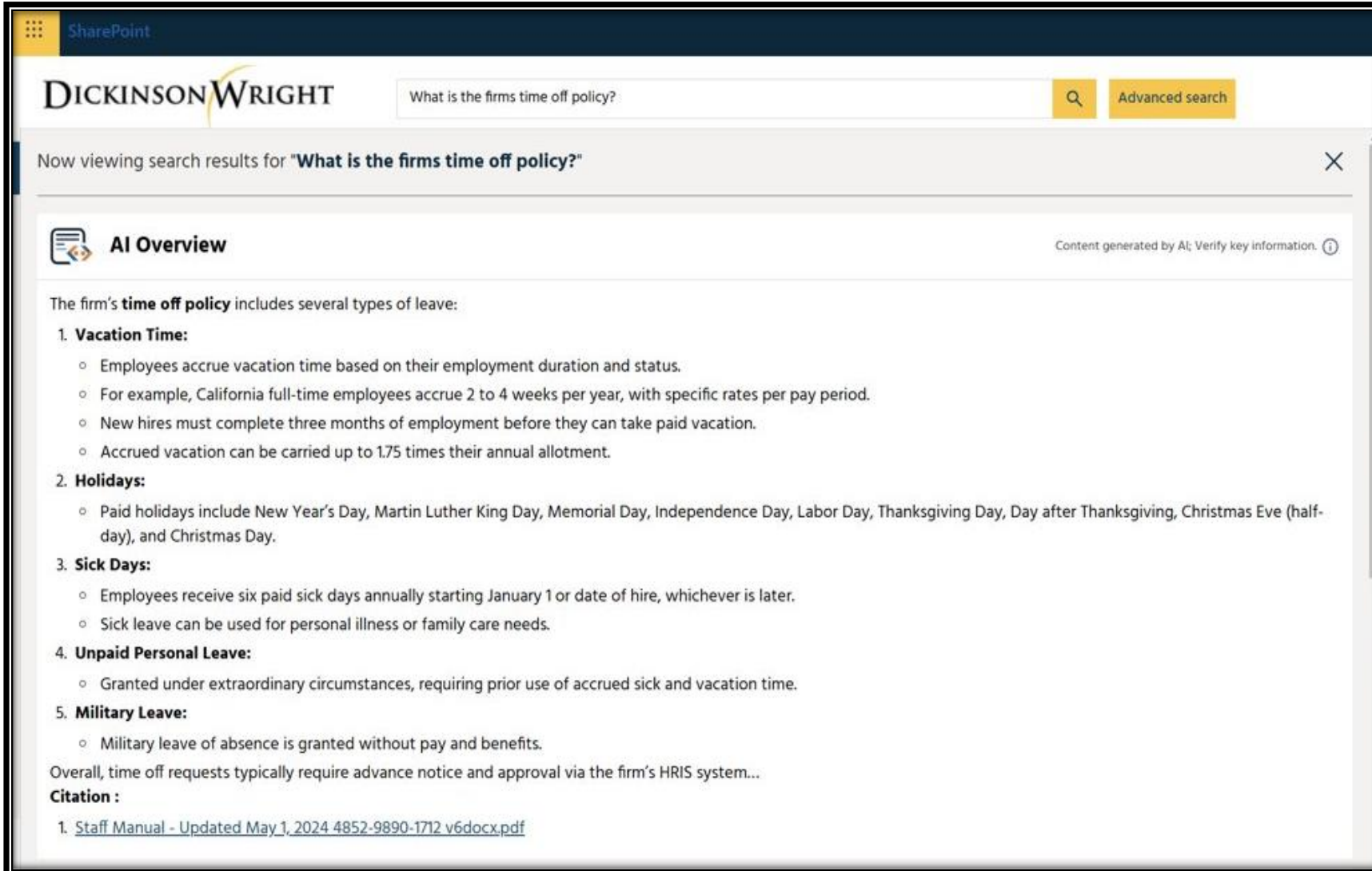
3

**Geospatial Integration:** Office pages feature interactive maps (Leaflet/OpenStreetMap) to provide location context and firm-wide presence



Real-Time Presence Inside the Intranet

# Firm Policy Query



SharePoint

DICKINSON WRIGHT

What is the firms time off policy? Advanced search

Now viewing search results for "What is the firms time off policy?"

**AI Overview** Content generated by AI; Verify key information.

The firm's **time off policy** includes several types of leave:

- Vacation Time:**
  - Employees accrue vacation time based on their employment duration and status.
  - For example, California full-time employees accrue 2 to 4 weeks per year, with specific rates per pay period.
  - New hires must complete three months of employment before they can take paid vacation.
  - Accrued vacation can be carried up to 1.75 times their annual allotment.
- Holidays:**
  - Paid holidays include New Year's Day, Martin Luther King Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, Day after Thanksgiving, Christmas Eve (half-day), and Christmas Day.
- Sick Days:**
  - Employees receive six paid sick days annually starting January 1 or date of hire, whichever is later.
  - Sick leave can be used for personal illness or family care needs.
- Unpaid Personal Leave:**
  - Granted under extraordinary circumstances, requiring prior use of accrued sick and vacation time.
- Military Leave:**
  - Military leave of absence is granted without pay and benefits.

Overall, time off requests typically require advance notice and approval via the firm's HRIS system...

**Citation :**

- [Staff Manual - Updated May 1, 2024 4852-9890-1712 v6docx.pdf](#)

# Employee Query

The screenshot shows a SharePoint search interface. At the top, the Dickinson Wright logo is on the left, and a search bar contains the query "Show me people who are senior data scientists". To the right of the search bar is a yellow "Advanced search" button. Below the search bar, a grey banner indicates "Now viewing search results for 'Show me people who are senior data scientists'". The main content area features an "AI Overview" section with a document icon and a warning: "Content generated by AI; Verify key information." Below this, a text block states: "Here is the information for a person with the job title of 'Sr. Data Scientist':". This is followed by a bulleted list of details for Jadin B. Tredup, including his name, redacted TimeKeeper Number, job title, email address (JTredup@dickinson-wright.com), office (Las Vegas), business phone (7025707712), extension (17712), and redacted Admin Department. A link is provided to view the profile "here".

SharePoint

DICKINSON WRIGHT

Show me people who are senior data scientists

Advanced search

Now viewing search results for "Show me people who are senior data scientists"

**AI Overview** Content generated by AI; Verify key information.

Here is the information for a person with the job title of "Sr. Data Scientist":

- **Name:** Jadin B. Tredup
- **TimeKeeper Number:** [REDACTED]
- **Job Title:** Sr. Data Scientist
- **Email:** [JTredup@dickinson-wright.com](mailto:JTredup@dickinson-wright.com)
- **Office:** Las Vegas
- **Business Phone:** 7025707712
- **Extension:** 17712
- **Admin Department:** [REDACTED]

For more details, you can view their profile [here](#).

# Matter Query

SharePoint

DICKINSON WRIGHT

Show me matters that opened in the last 90 days

Advanced search

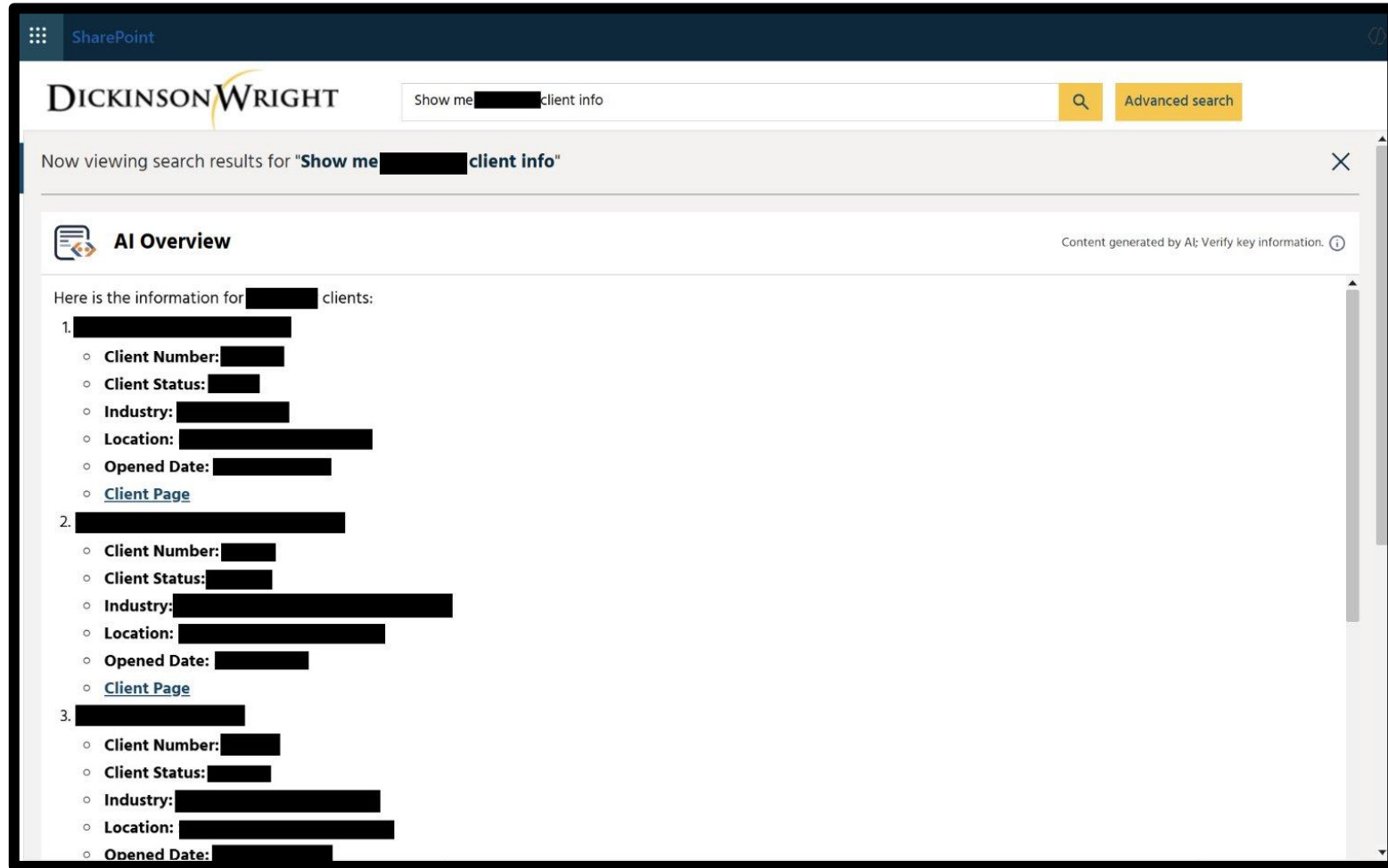
### AI Overview

Content generated by AI; Verify key information.

Here are the matters that opened in the last 90 days:

- Matter Description:** [REDACTED]  
**Matter Office:** [REDACTED]  
**Matter Department:** [REDACTED]  
**Matter Status:** [REDACTED]  
**Matter Open Date:** [REDACTED]  
**Client Matter Number:** [REDACTED]  
**Client Name:** [REDACTED]  
**Total AR:** [REDACTED]  
**YTD Billable Fees:** [REDACTED]  
**Shared Credit Splits:** [REDACTED]  
[View Matter](#)
- Matter Description:** [REDACTED]  
**Matter Office:** [REDACTED]  
**Matter Department:** [REDACTED]  
**Matter Status:** [REDACTED]  
**Matter Open Date:** [REDACTED]  
**Client Matter Number:** [REDACTED]  
**Client Name:** [REDACTED]  
**Total AR:** [REDACTED]  
**YTD Billable Fees:** [REDACTED]  
**Shared Credit Splits:** [REDACTED]  
[View Matter](#)
- Matter Description:** [REDACTED]  
**Matter Office:** [REDACTED]

# Client Query



# Live Demo

The screenshot shows a SharePoint page for Dickinson Wright. At the top, there is a dark blue header with the 'SharePoint' logo on the left and navigation icons on the right. Below this is the Dickinson Wright logo and a search bar with the text 'Search People, Clients, Matters, Intranet and Links...'. A navigation menu contains links for 'HOME', 'OUR FIRM', 'DIVISIONS', 'OUR OFFICES', and 'FIRM DIRECTORY'. A secondary navigation bar includes '+ New', 'Promote', 'Page details', 'Preview', and 'Analytics'. On the right side of this bar, it says 'Draft saved 10/22/2025' and provides 'Share', 'Edit', and 'Republish' options. The main content area features a large banner with a futuristic, golden and blue design and the text 'All Your AI Tools, One Place.'. Below the banner, a section titled 'Not finding what you are looking for?' lists several AI tools: 'MPEP Bot' (with a United States Department of Justice seal), 'CoCounsel' (with a pattern of orange dots), 'ndi' (with a blue and white logo), and a tool with a blue map of Michigan.

# Looking to the Future: Client Intake

## How can we improve the client intake and conflict resolution process?

- **Objective:** Reduce time taken for client intake, make pricing decisions smoother and reduce rejections.
- **Integrations:** Leveraging connectors through Outlook, Teams, Intapp, NetDocs, and Entegrata.
- **Hierarchical Information Collection:** Information is first obtained through exploratory email scraping then remaining is collected via chat.
- **Centralized Data Sources:** Brings in data from all tables: matter, client, attorney, conflict and more.
- **Knowledge Base:** Arming the AI with firm history to avoid pitfalls



# Impact & Outcomes

## 1 Expert Identification in Seconds

Users can now execute complex queries like "**Find an IP Professional who can speak Mandarin Chinese from the New York office**" and get results instantly

## 2 Instant Financial Intelligence

Natural language queries such as "When was the last payment received for matter 710240-09800" now return exact figures (\$231 USD) and dates (10/04/2024)

## 3 Comprehensive Client Summaries

A simple request like "Give me details about client id 014705" yields an immediate AI-generated report including status, industry code, and open date

## 4 Historical Billing Insights

Attorneys can use AI to surface deep-dive data, such as "Show me matters billed in the last 10 years that reached over \$10,000 in billing"

The measurable success achieved post-implementation.

# MINUTES to SECONDS

Efficiency Gains in Data Retrieval



### Instant Answers

Financial data and people search via AI.



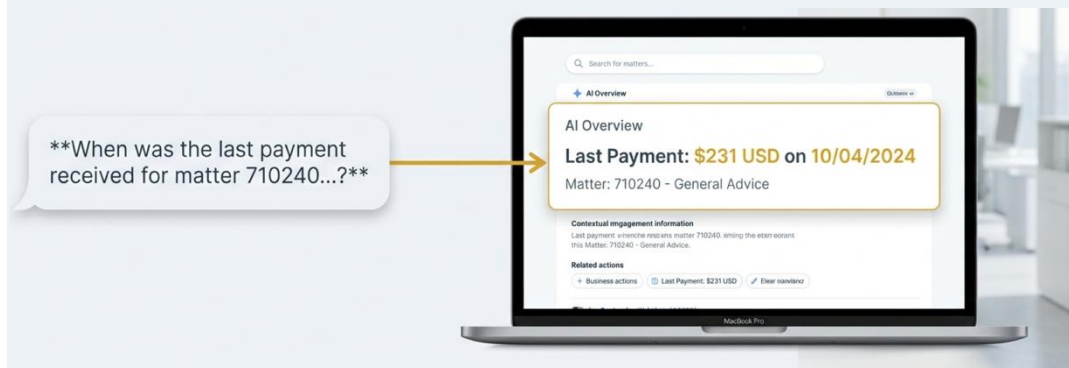
### Compliance Visibility

Improved oversight on ethical walls and conflict checks.



### Engagement

High adoption driven by persona-based relevancy.



# Lessons Learned & Best Practices:

Valuable takeaways and recommendations for similar projects.

## 1 Data is King

The firm's primary takeaway is that **AI output can only be as good as the input**, making high-quality data connections vital

## 3 Focus on Actionable Results

AI should be used to evaluate data and **return only the parts useful to the user** rather than overwhelming them with more information

## 2 Strategic Data Partnerships

Success requires **partnering closely with data storage and management teams** to set up reliable connections that fuel the AI experience

## 4 Relevancy as the Engagement Driver

Designing for **personas** ensures that the AI-powered tools remain a high-value resource for the firm's professionals.



# Renee Morris

## Vice President of Operations & Data Strategy

“Our AI-powered intranet transforms how we manage institutional knowledge, serving as a centralized hub for all our AI tools and enabling instant access to firm expertise. By intelligently surfacing the right information at the right time, we empower our team to focus on high-value work rather than administrative tasks. This one-stop platform ensures that every team member benefits from our collective expertise and AI capabilities, regardless of their tenure or practice area.”

DICKINSON WRIGHT Search People, Clients, Matters, Intranet and Links... Advanced search

Now viewing search results for "all"

### People Results

**Emily R. Lawson**  
Associate Attorney, Real Estate, Division 1  
Austin  
T: (XXX) XXX-XXXX  
E: elawson@firmname.com

**Priya N. Malhotra**  
Associate Attorney, Division 2  
Austin  
T: (XXX) XXX-XXXX  
E: pmalhotra@firmname.com

**Robert A. Miller**  
Associate Attorney, Division 2  
Austin  
T: (XXX) XXX-XXXX  
E: rmiller@firmname.com

**Daniel K. Brooks**  
Legal Assistant, Legal Secretary  
Austin  
T: (XXX) XXX-XXXX  
E: dbrooks@firmname.com

**Michael J. Turner**  
Legal Assistant, Legal Secretary  
Austin  
T: (XXX) XXX-XXXX  
E: mturner@firmname.com

**Sophia L. Chen**  
Administrative Assistant, Legal Secretary  
Austin  
T: (XXX) XXX-XXXX  
E: schen@firmname.com

### Client(s) Results

Northbridge Energy Solutions, Inc. (C-10458)  
Apex Financial Group LLC (C-11732)  
Blue Harbor Technologies (C-09214)  
Evergreen Logistics Corp. (C-13509)  
Summit Healthcare Partners (C-08871)

### Matter(s) Results

Northbridge Energy – Regulatory Compliance Review (M-220145)  
Apex Financial – Vendor Contract Dispute (M-219872)  
Blue Harbor Technologies – IP Licensing Agreement (M-221004)  
Evergreen Logistics – Employment Arbitration (M-218993)  
Evergreen Logistics – Employment Arbitration (M-218993)

### Intranet Content

- Things To Do (Last Modified: May 23, 2023, Author: Audrey A. Giannola)
- New Employee Onboarding Checklist (Last Modified: May 23, 2023, Author: Daniel P. Wright)
- Electronic Staff Manual Acknowledgement (Last Modified: May 23, 2023, Author: Jeffrey C. Atkins)
- Local Hotels (Last Modified: May 23, 2023, Author: Alexandra A. Pickett)
- Staff Manual (Last Modified: May 23, 2023, Author: Chester J. Holton)
- DICKINSON WRIGHT RLLP (Last Modified: May 23, 2023, Author: Ruby C. Gomez)

{my office} All events

January 2024

MON	TUE	WED	THU	FRI	SAT	SUN
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

### Events

01/15 | All day  
Title of the event lorem ipsum dolor sit amet consectetur adipiscing elit, sed

01/15 | 11:00 AM - 1:00 PM  
Nec arcu bibendum sit mauris.

01/15 | 12:00 AM - 3:00 PM  
Nec arcu bibendum sit mauris.

01/15 | 1:00 PM - 4:00 PM  
Title of the event lorem ipsum dolor sit amet adipiscing elit.

### Colleagues

**Colby L. Zurbay**  
Division 2, Associate Attorney  
Austin  
T: (XXX) XXX-XXXX  
E: czurbay@dickinson-wright.com

**Jean J. Burdett**  
Member And International Practice Group Co-Chair  
Austin  
T: (XXX) XXX-XXXX  
E: jeanjb@dickinson-wright.com

# KLapper for iManage Work Web

## iManage Cloud / iManage Work Server

- **Create an AI Agent On-Demand** – Add a KLapper AI Agent to any iManage Workspace.
- **Contextual & Current** – Select one or more documents to limit the KLapper AI Agent scope – improved relevancy and accuracy. KLapper AI Agent automatically learns the updated documents
- **Secure & Ethical AI** – KLapper AI Agent only shows answers based on the user's security permissions and SPM Walls
- **Use in iManage Work on-prem or Cloud** – KLapper AI Agent can be used within iManage Work Server 10.4.x+ on-premises or iManage Work Cloud or Cloud iManage

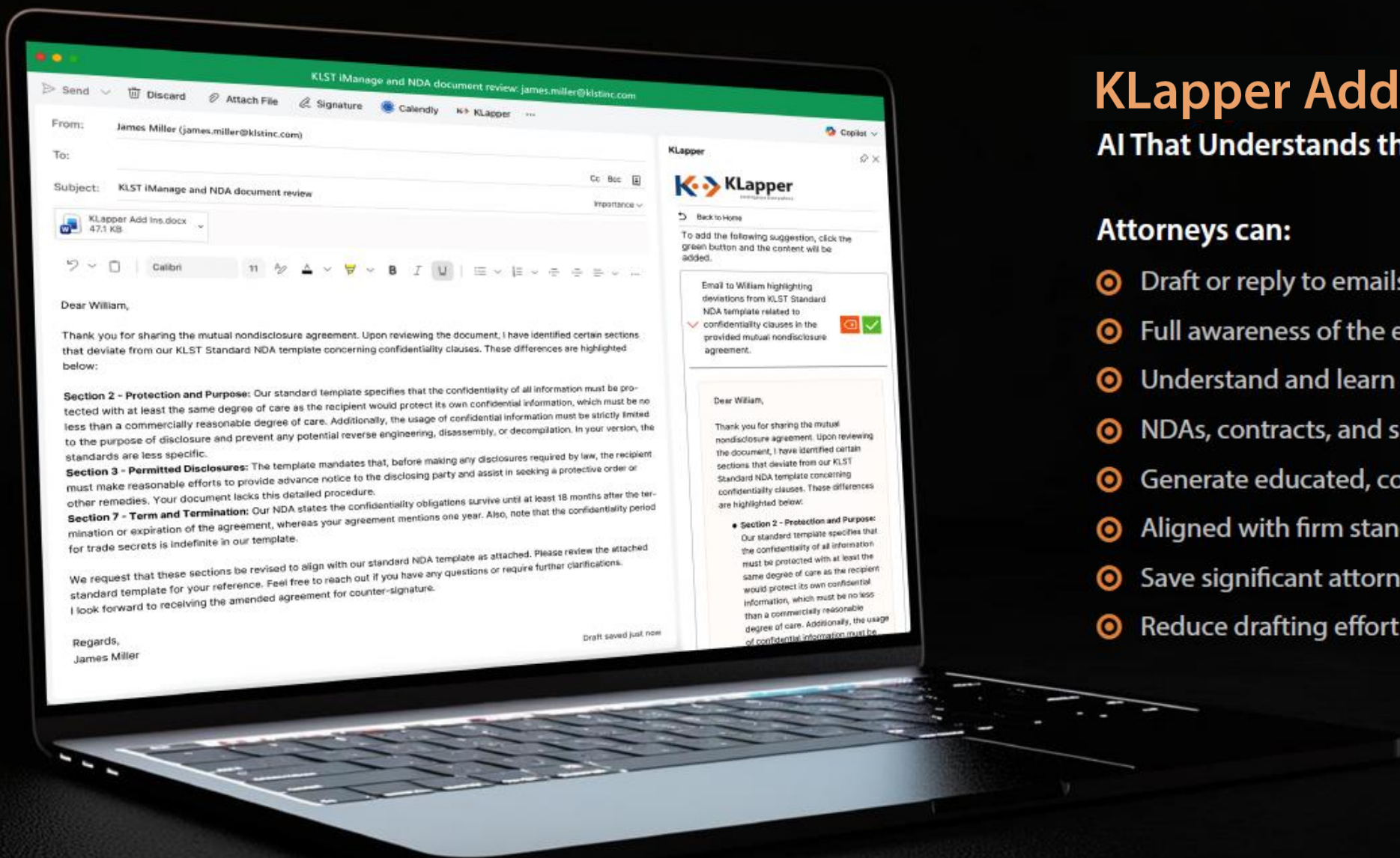
The screenshot shows the iManage Work Web interface. The main content area displays a list of documents under the 'Client Agreements' folder. The documents are as follows:

Title	Version	Doc. Number	Edit Date
Contoso Contracts			2/28/2026 7:45 PM
Lease Agreements			2/20/2026 9:00 AM
SPO Agreements			1/21/2026 10:29 AM
Wingtip Toys AD002.docx	1	975,040	2/13/2025 7:46 PM
8.1 Investment Section CMD...	2	974,926	1/10/2025 3:37 PM
2.0 FY25 Annual Board Mee...	1	974,927	11/13/2025 3:42 PM
KLST - GDPR Addendum.pdf	2	227,071	5/16/2025 11:42 AM
KLST Standard NDA Templa...	4	321,738	5/16/2025 6:34 PM
KLST Non-Disclosure Agree...	2	321,742	5/21/2025 2:04 PM

The AI Agent interface on the right shows the following interactions:

- Question:** Who are the two major competitors of Northwind Traders?
- Answer:** The two major competitors of Northwind Traders are:
  - Ferguson and Bardell
  - Lakes & Sons
 Citations:
  - Wingtip Toys AD002.docx
  - 8.1 Investment Section CMD.docx
- Question:** What is the personnel data collection policy as per the KLST GDPR doc?
- Answer:** The personnel data collection policy according to the KLST GDPR Addendum is outlined in the section detailing the processing of KLST Personal Data. Specific elements include:
  - Collection and Processing:**
    - Employee Status
    - Employee ID
    - Full Name (First and Last Name)
    - Business Email Information
    - Employee Contract Number

The KLapper logo is visible at the bottom right of the interface.



## KLapper Add-In for Outlook

### AI That Understands the Entire Email Conversation

#### Attorneys can:

- 🕒 Draft or reply to emails automatically
- 🕒 Full awareness of the entire email thread
- 🕒 Understand and learn from attachments
- 🕒 NDAs, contracts, and supporting documents
- 🕒 Generate educated, context-rich responses
- 🕒 Aligned with firm standards and prior correspondence
- 🕒 Save significant attorney time
- 🕒 Reduce drafting effort without sacrificing quality

# KLapper Add-In for Word

## Context matters in Legal Contract Review & Drafting

### Attorneys can:

- 🕒 Review contracts against firm-approved playbooks
- 🕒 Automatically identify deviations, risks, and redlines
- 🕒 Draft new documents with precision
- 🕒 Use approved templates and boilerplate as grounding context
- 🕒 Edit and refine language intelligently
- 🕒 Clause-level recommendations aligned with firm standards
- 🕒 Work seamlessly inside Microsoft Word
- 🕒 No external tools, uploads, or prompt gymnastics

The screenshot displays the Microsoft Word interface with the KLapper add-in. The document title is "Document1". The ribbon includes tabs for Home, Insert, Draw, Design, Layout, References, Mailings, Review, View, QuillBot, Grammarly, and Docusign. The KLapper sidebar is active, showing a "Back to Main Menu" button and a list of suggestions. One suggestion is highlighted: "Added clause for no binding agreement for transaction." The text of this suggestion is: "No Binding Agreement for Transaction. The parties agree that neither party will be under any legal obligation of any kind whatsoever with respect to a Transaction by virtue of this Agreement, except for the matters specifically agreed to herein. The parties further acknowledge and agree that they each reserve the right, in their sole and absolute discretion, to reject any and all proposals and to terminate discussions and negotiations with respect to a Transaction at any time. This Agreement does not create a joint venture or partnership between..."

The document content includes the following text:

**Standard Non-Disclosure Agreement**

In connection with the consideration of a possible \_\_\_\_\_ (the "Purpose"), the Recipient desires to receive certain information from the Disclosing Party that is non-public, confidential, or proprietary in nature; and in consideration of the mutual covenants, terms and conditions set forth herein, the Parties agree as follows:

I. **Confidential Information:**  
Confidential information means all non-public, confidential, or proprietary information of the Disclosing Party, whether in oral, written, or other form, that is disclosed or made available to the Recipient directly or indirectly. Confidential Information includes, but is not limited to, plans, data, designs, documents, drawings, financial reports, formulations, manuals, marketing plans, product plans, research, software, specifications, and trade secrets.

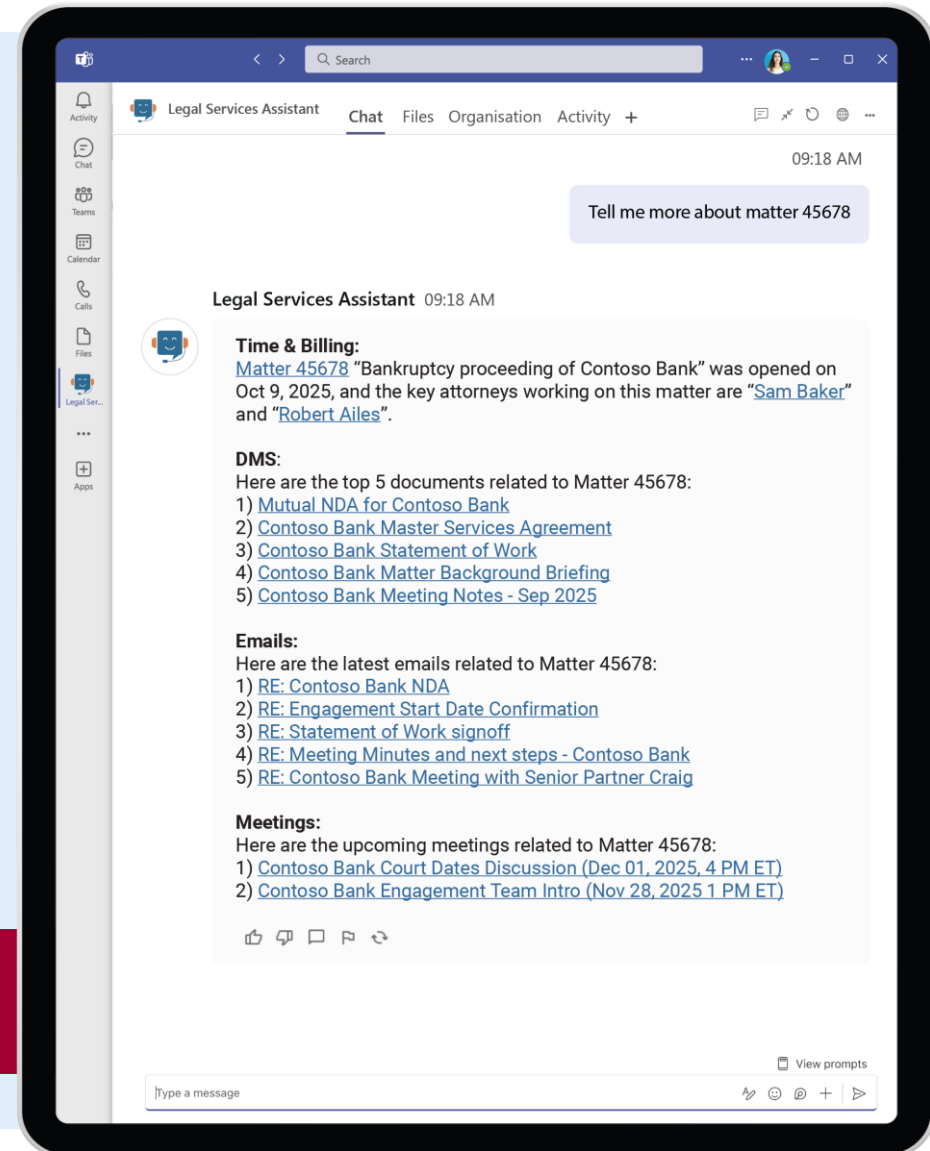
(a) at the time of disclosure is, or thereafter becomes, generally available to and known by the public other than as a result of, directly or indirectly, any act or omission by the Recipient or any of its Representatives;

# KLapper – MCP Tools & Agentic Workflow

## iManage Cloud / iManage Work Server

- **No-Code Skill Builder:** KLapper empowers Knowledge Management teams in law firms to design and deploy virtual legal assistants without requiring coding skills, offering a user-friendly interface for effective customization.
- **Agentic Workflows Automation:** It streamlines legal workflows by automating tasks like contract drafting, billing, document review, and legal research, ensuring enhanced productivity and efficiency.
- **Integration with Firm Applications:** KLapper seamlessly connects with key applications such as NetDocuments, iManage, SharePoint, Salesforce, and billing/time management systems, enabling intelligent access to legal data.
- **Microsoft Azure Deployment:** KLapper is securely installed within a firm's private Microsoft Azure Tenant, ensuring compliance with data security regulations while offering scalability for AI models like Azure OpenAI, Gemini, and Claude.

KLapper with  
MCP Tools  
Support



# THANK YOU!

CONNECT WITH US



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