



Morae Case Study



Exelon

LOCATION
MULTINATIONAL · HQ IN
LONDON, ENGLAND

INDUSTRY
ENERGY

TECHNOLOGIES
SIMPLELEGAL BY ONIT

SOLUTION
ENTERPRISE LEGAL
MANAGEMENT

Back to Basics With Enterprise Legal Management

Law Department of a Fortune 100 Energy company adopts and implements a new simplified ELM system

“Our engagement with Morae and SimpleLegal has enabled Exelon’s Legal Department greater access to real-time matter and spend management information via a consolidated dashboard and reports. Additionally, we are excited to see increased user adoption of the SimpleLegal system, which will help drive consistent behavior with the management of matters.”

Melissa Lauderdale, WardLegal Operations Director, Exelon





Streamlined, cloud-based matter management and electronic billing allows Corporate Legal Departments to do more with less.

Corporate Legal Departments across the world are continually asked by leadership to do more work with fewer resources. Enterprise Legal Management (ELM) software helps members of legal departments centralize all legal matters, tasks, notes, files and electronic invoices into one go-to system.

By centralizing information and tasks, teams can simplify and improve internal collaboration on matters and spend less time searching for missing data in other systems. In addition, a centralized system and real-time dashboards provide department leadership with a much better picture of the team's workload and external legal spend.

Choosing to Simplify

In 2019, Exelon Corporation, a Fortune 100 power producer and regulated utility company, decided to do something unconventional with the way their Legal Department uses and interacts with its ELM system.

After careful consideration and discussion of the options, legal department leadership decided to move away from their larger, more complex ELM system, to a more standardized, lighter-weight ELM system by 2021.

This decision was a surprise to many stakeholders, as most Legal Departments around the world tend to grow into more flexible ELM systems to support customized workflows - not the other way around.

However, Exelon's leadership was certain that a more straight-forward system would not only cover their needs, but also encourage broader adoption and consistent use.

Project Goals

- Enable the legal team to better manage their legal spend through a beautifully simple system that encourages hands-on usage, including real-time insights to help them accurately budget and forecast;
- Better collaboration with outside counsel, enabling them to submit budgets, invoices, and monthly accruals – all from within a dedicated vendor portal;
- Reduction in manual Legal Operations tasks;
- Improve forecast accuracy and meet budget challenges set by Finance;
- Reduce operational costs and total cost of system ownership with regular, cloud-based updates and elimination of custom development and technical maintenance.

Configuring SimpleLegal

Exelon selected SimpleLegal By Onit's ELM system to replace their legacy ELM system. Moving from their complex legacy system presented several challenges, including figuring out how to move from a "steamer trunk" to a much smaller and nimbler "carry-on suitcase" ELM solution. With the knowledge that challenges would arise in making such a significant move, Morae's team of ELM experts was selected to help Exelon with the transition and implementation.



SimpleLegal's enterprise legal management software can help manage the whole of your legal department's operations.

Exelon and Morae kicked off the project implementation with the gathering of additional system requirements from all the practice groups within the Legal Department.

A number of solutions and methods were proposed to meet all the requirements. Initially there were a few sets of complex requirements requested that SimpleLegal was not designed to support. Upon further investigation, it was clear that the complexity could be streamlined into a far more efficient and effective process, easily supported by SimpleLegal.

This streamlined design wouldn't overwhelm users with too many fields or dropdown options, making it easier to use and encouraging adoption and use.

While the system design was underway, three critical system integrations were set up between SimpleLegal and eDocs, Exterro Legal Hold, and Exelon's Accounts Payable System. Data mapping and migration was also conducted from Exelon's legacy system into SimpleLegal.

Extensive testing scripts were then created to assess the system integrations and user acceptance in order to thoroughly run the new SimpleLegal system through the paces and make sure all of the Legal Department's requirements were met.

After hundreds of test runs, it was confirmed that the system was ready to be rolled out in early 2021.

The roll out was completed on-time and on-budget in March 2021.

Exelon was subsequently recognized at the 2022 LegalWeek Leaders in Tech Law Awards as one of Most Innovative In-House Operations Teams of the Year

The Results

- Significant end user adoption to drive consistent behavior and compliance with guidelines;
- System integrations streamlined and optimized the billing and spend management process;
- Automated billing guideline enforcement to capture additional savings on electronic invoices;
- All invoices processed electronically such that the legal team no longer needed to log into two separate systems to approve invoices;
- Improved Legal visibility and ability to manage spend by consolidating data and implementing a system that is simple enough that attorneys could access the system directly;
- Improved access to real-time matter and spend management information for end-users via consolidated dashboards and reports;
- Increased accuracy in forecasting by automating accruals.

