Chamelio / Whitepaper

Matter management is now in Chamelio



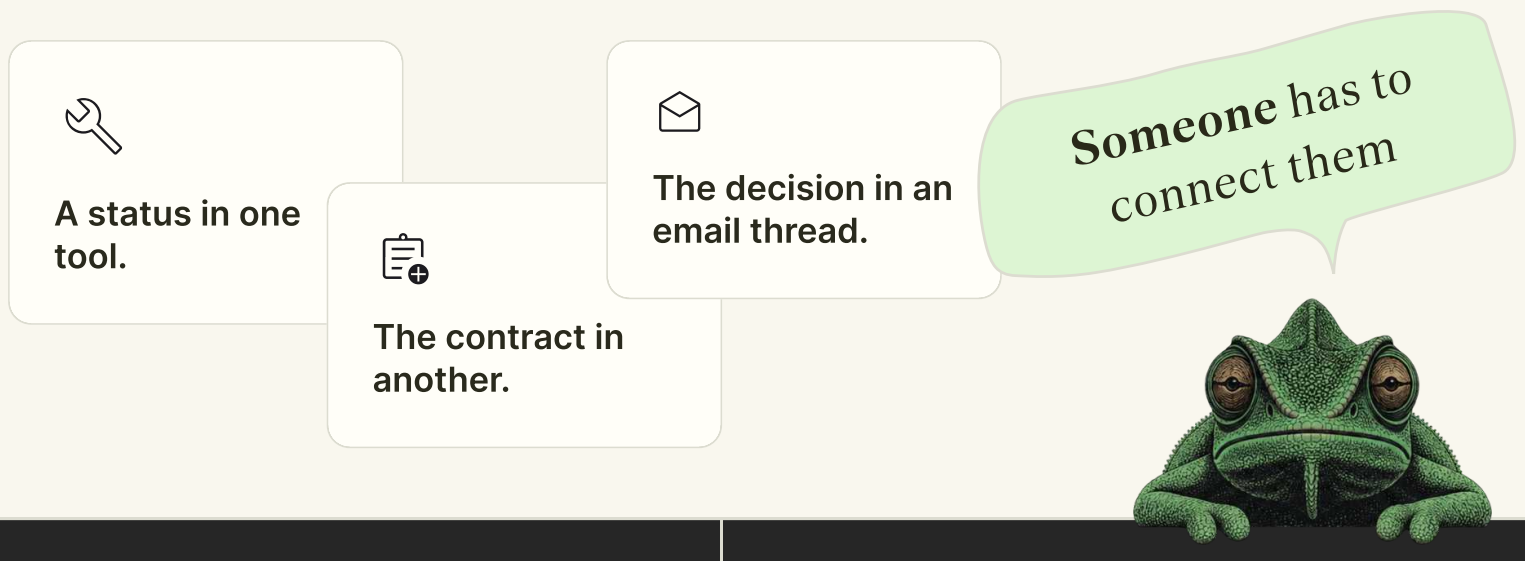
Why use a standalone matter management tool when you can manage matters where the work actually happens? Chamelio brings matters into the same place as your contracts, knowledge, AI and workflows.

THE PROBLEM

Stop managing matters with tools that only manage.

Legal work keeps growing, and the tools that track it sit apart from the work itself. The real problem was never keeping a list of matters. It's that the context lives somewhere else.

WHAT IT LOOKS LIKE TODAY:



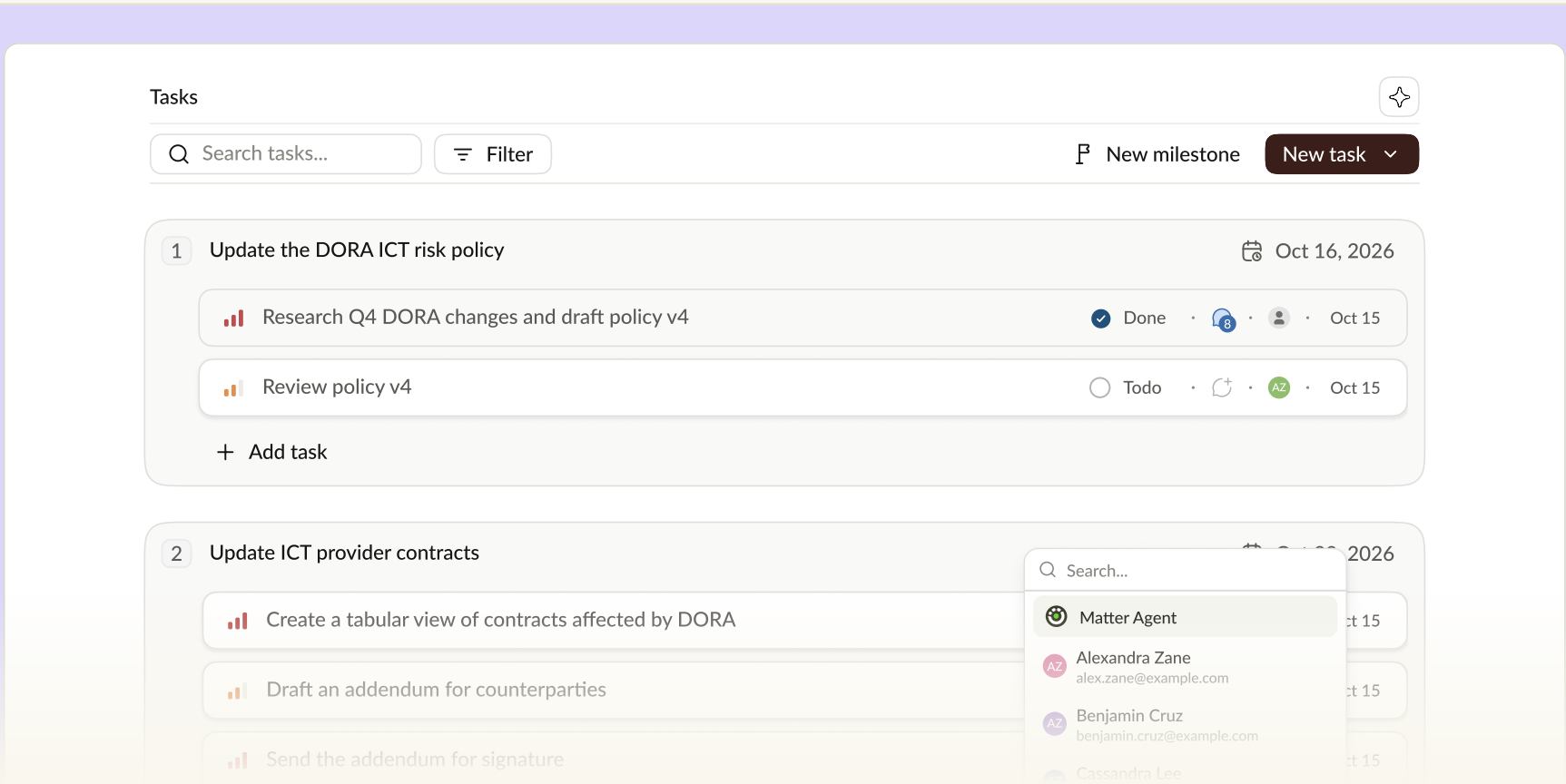
81 %

of legal departments report rising Matters volume.[1]

74 %

of corporate legal professionals said they lacked clear or accurate tasks on work performed.[2]

[1] Thomson Reuters, State of the Corporate Law Department Report 2026, as cited by CMSWire/Mitratech. [2] Deloitte, Legal Operations Survey 2020.



THE SOLUTION

Why manage matters in Chamelio?

Chamelio connects matters, contracts and workflows in one place, keeping work moving and progress up to date automatically.

Spreadsheets, emails, shared drives	**Generic Project tools**	**Standalone matter management**
Easy to start, hard to keep true	Good at tasks, blind to legal context	Strong at tracking and reporting but with not getting anything done

The task: Get a template approved by Finance.

In a separate tool

Five manual steps, across three places.

1. Find the task in the tracker — MANUAL
   The contract and the template are somewhere else.
2. Find the template and the playbook — MANUAL
   Search the drive or another system.
3. Email Finance for approval — MANUAL
   Attach the file and explain the context.
4. Chase the answer — MANUAL
   Wait, remind, wait again.
5. Update the status by hand — MANUAL
   Then update the report.

- **Every step depends on someone remembering.**

In Chamelio

Two easy actions by people. The rest follows.

1. "@VP Finance, please approve the updated template." — YOU
2. The approval workflow starts — CHAMELIO
3. Finance approves — FINANCE
4. Status and progress update — CHAMELIO

- **Nobody updates a status by hand. Files are alreay there**

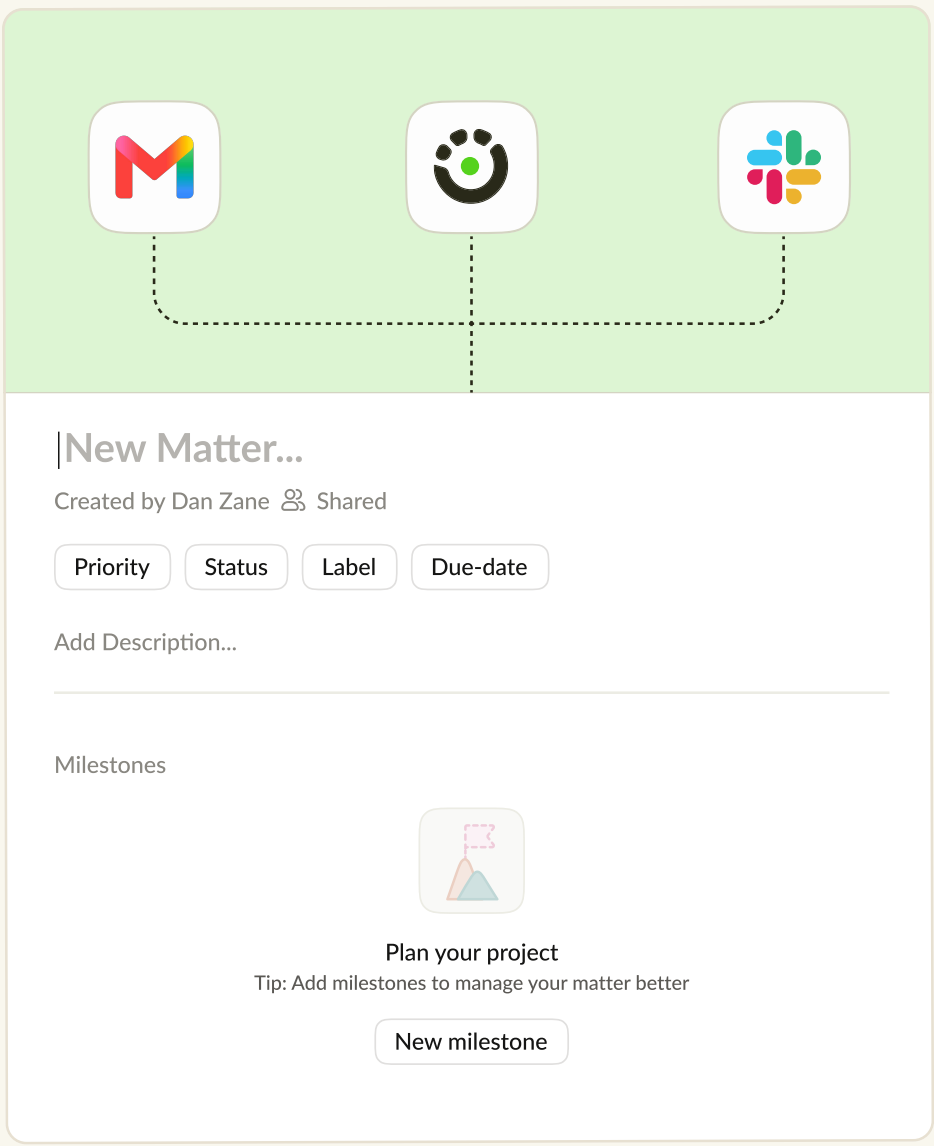
How we make it work



01/ CREATE

Set up a matter in a minute.

A matter is one workspace for one piece of legal work: a deal, a negotiation, a policy update, an investigation. Set one up in the app, or start it from Slack, the Agent or email.



01 **Name it and write the brief**

The description is what your team and the agent work with for alignment.

02 **Set the basics**

Owner, teams, status, priority and due date sit in the Matter panel, so anyone opening the matter sees them first.

03 **Add milestones and tasks**

Create them manually or ask the agent to draft the plan.

04 **Keep it private or share it**

Work on a matter alone, or share it with your team when it's ready. Coming soon: External collaboration.

START IT FROM WHEREVER THE WORK STARTS

Tag @Chamelio in Slack

Ask in a channel: "Create an M&A matter for Acme and set up the workplan."

Describe it in chat

Say what needs to happen. Chamelio's agent builds the matter and its tasks.

Send it to the Agent

Email a request and the Agent can turn it into a matter.

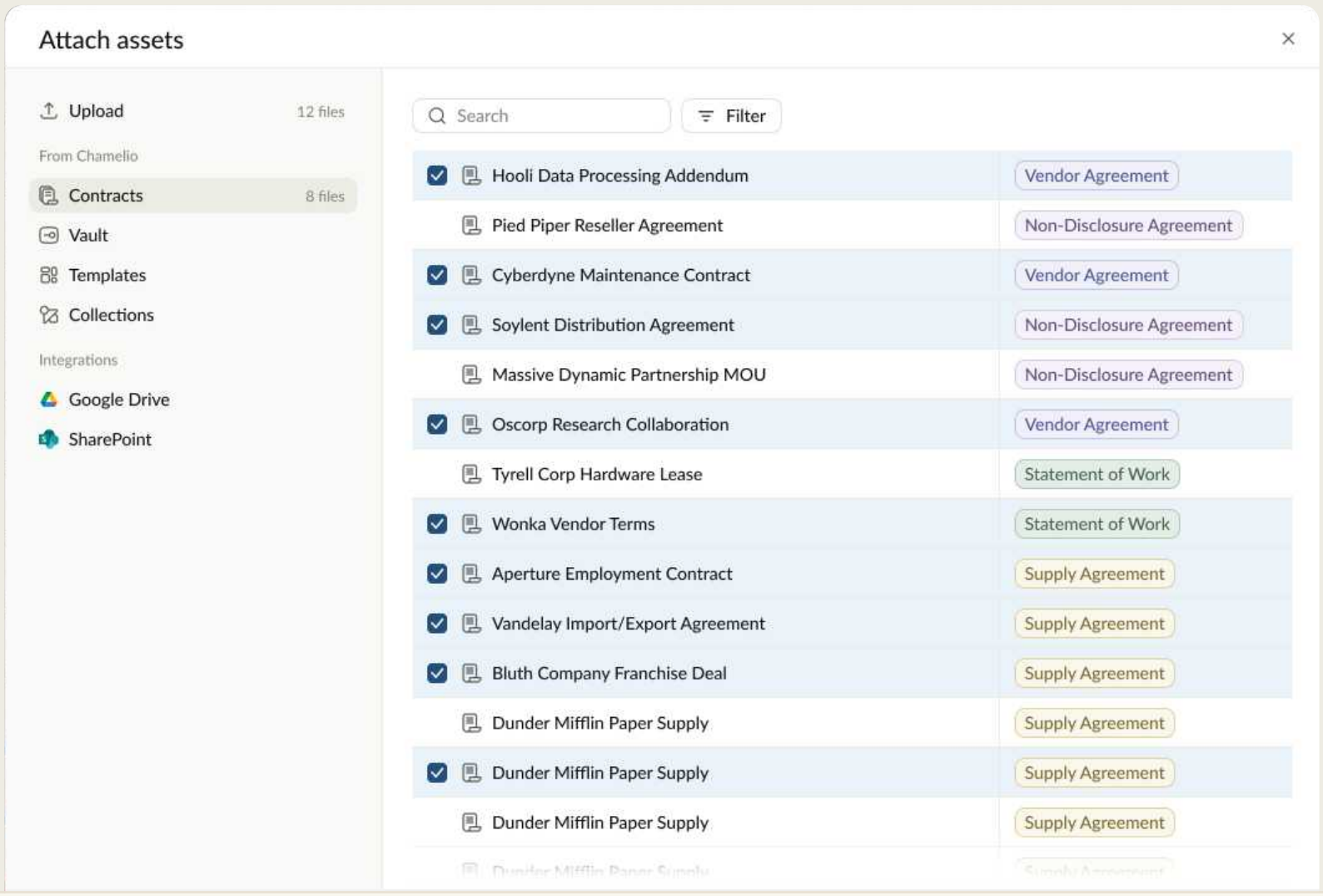
Any Agent touchpoint

Same request, same matter, wherever you ask.

02/ ATTACH

Put every file the matter needs in one place.

Attach what the work depends on, so nobody re-uploads files or searches folders for the latest version.



Attach assets from Chamelio (contracts, Vault, templates, collections) or from the company Drive.

WHERE FILES COME FROM

01 **Chamelio** Contracts, Vault documents, templates and collections.

02 **Your tools** Google Drive and Share point

03 **Computer** Upload any file from the New menu or Assets tab



03/ PLAN

Break the work into tasks even the Agent can be assigned and act.

Every matter has a task list. Everyone in the company can see what's open, who owns it and what comes next (You control who sees what). **You can give a Task to an Agent to complete and connect the Matter to a workflow so work is always moving.**

Break the work into tasks

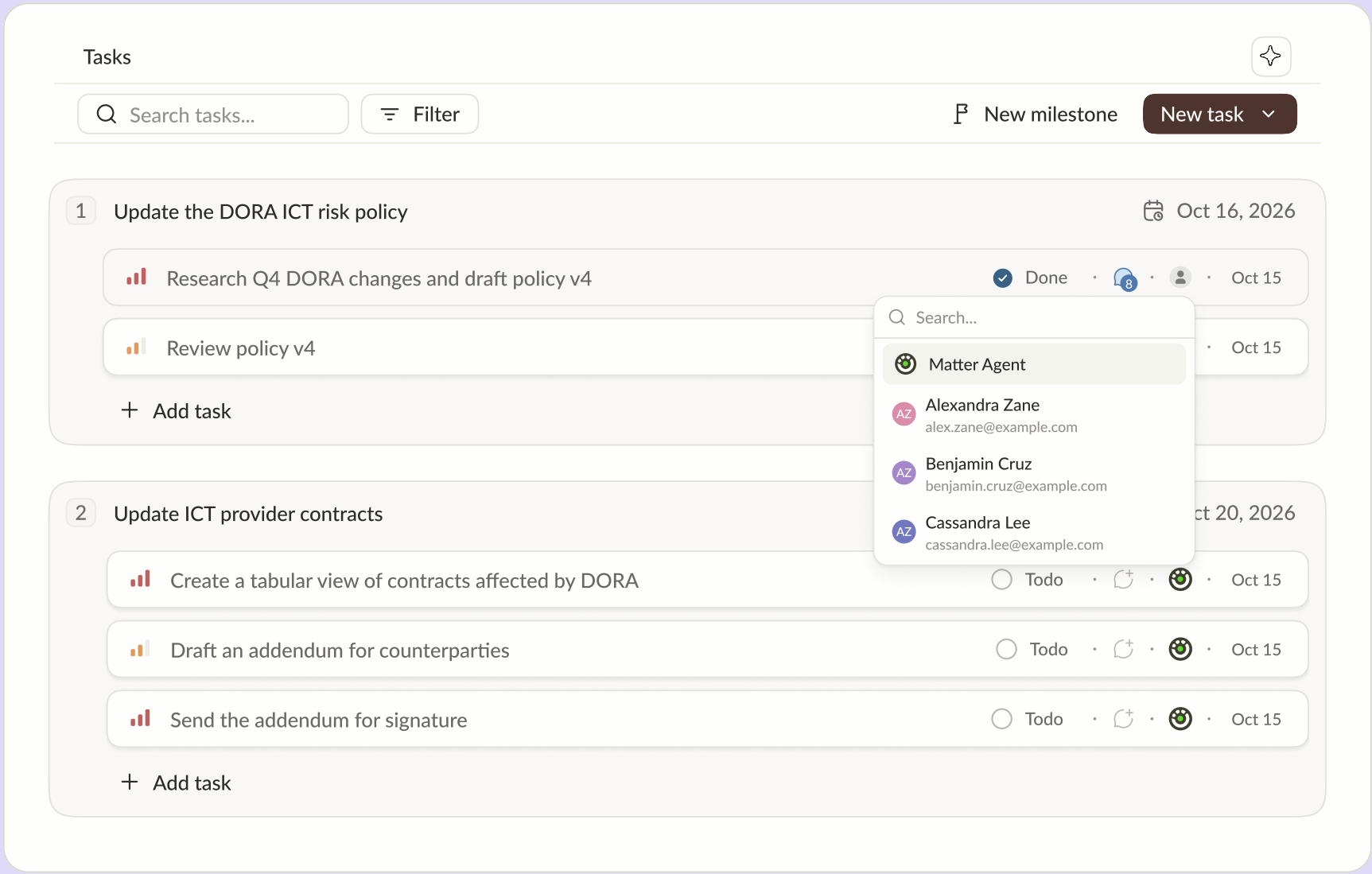
List what has to happen, from NDA review to advisor engagement, and set a priority.

Assign every task

Each task has an owner. Filter by assignee to see who has what. **You can even give the task to an Agent.**

Add as you go

New tasks and milestones take a click. Templates cover the matters you run often.

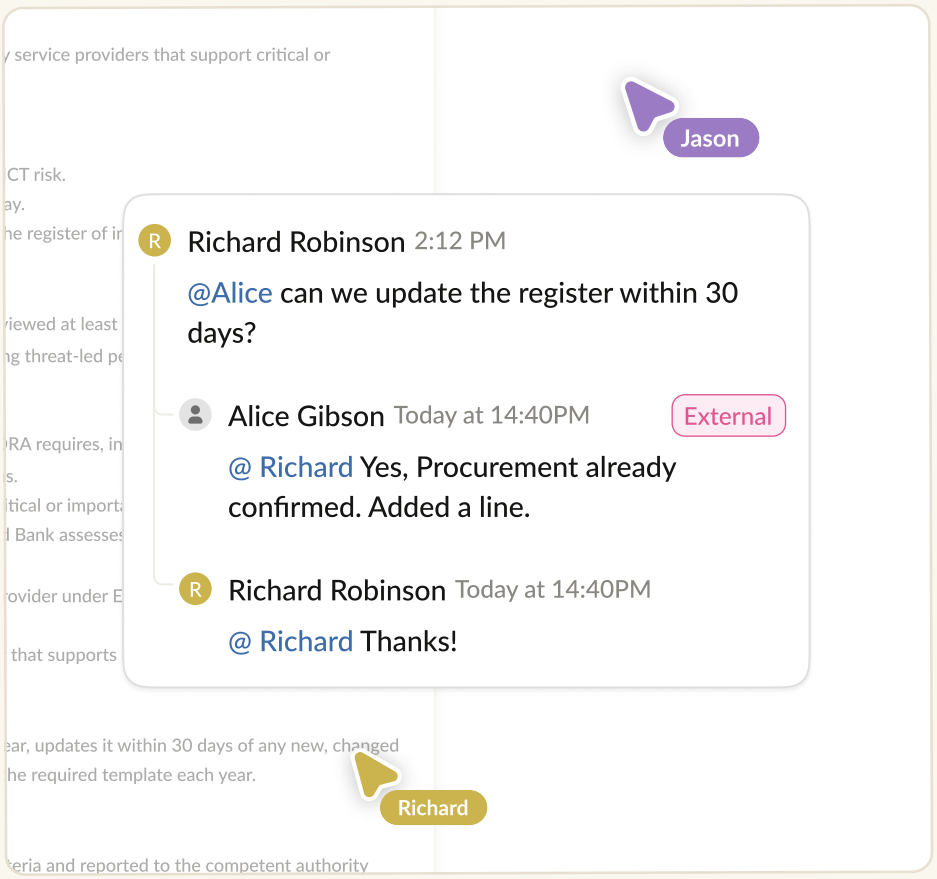


A matter's task list: each task has a status, a priority marker and an assignee.

04/ COLLABORATE

Everyone works from the same matter.

Teammates see the same files, tasks and status, and talk about the work where the work is, not in separate email threads and chats.



TEAM & CROSS COMPANY COLLABORATION

Share it or keep it private

Work on a matter alone, or share it with other teams. The avatars at the top show who is on it.

Assign and mention

Every task has an owner. Mention a teammate to bring them in.

Discuss in place

Comments and the matter's team chat sit next to the files and tasks they're about.

VISIBILITY

When someone opens the matter, they see:

One status for everyone

Owner, status, priority and due date sit at the top of the matter.

Know who changed what

Uploads, comments, agent actions and status changes are on one timeline, with names and times.

See what needs attention

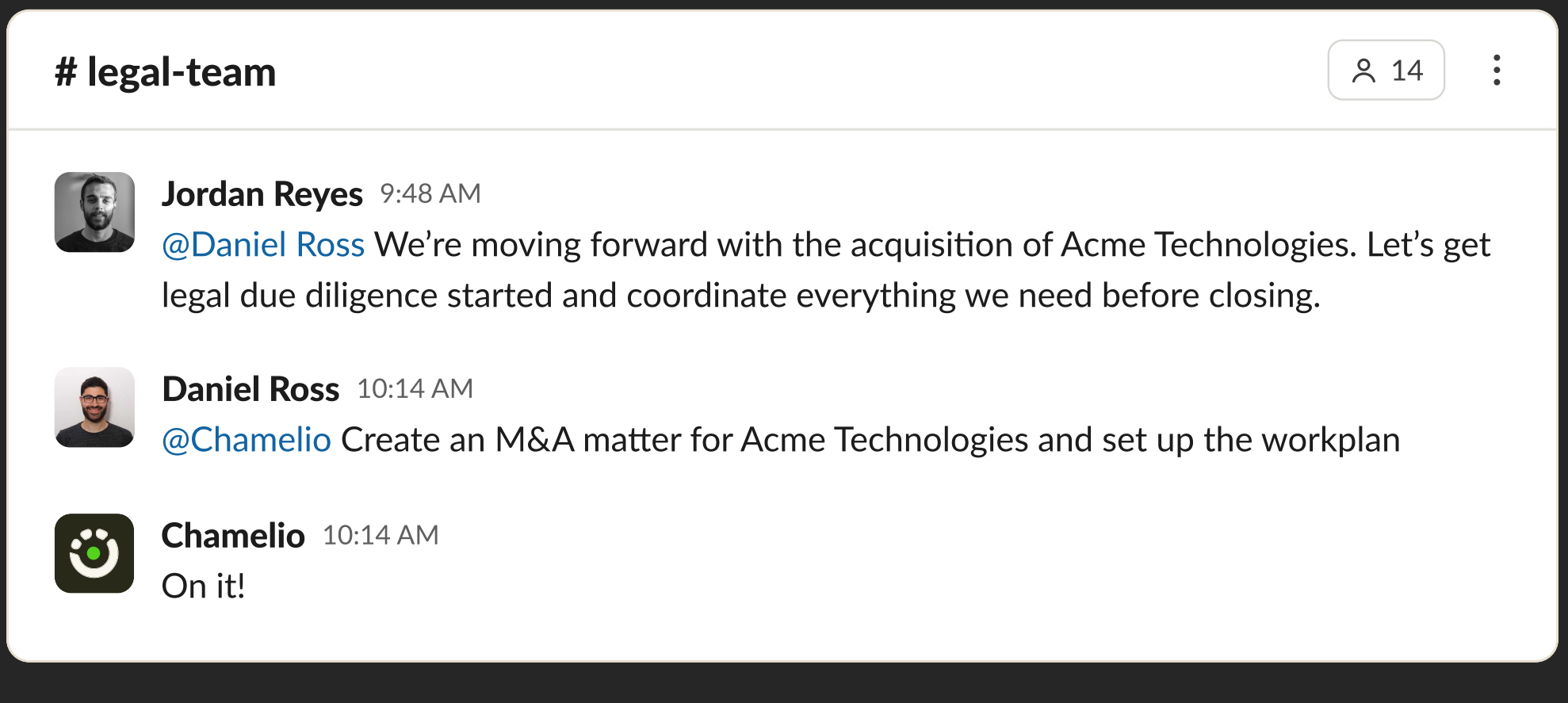
The Projects page lists active and closed projects and flags the items that need you.



USE CASE · M&A DUE DILIGENCE

From a Slack message to a running deal.

No forms, no setup, no project template to build. Ask in the channel where the request already happened.



01 **Tag the agent**

One message in Slack. That's the whole request.

02 **The matter builds itself**

Milestones, tasks, assignees, due dates and statuses appear within seconds.

03 **Work starts**

Related contracts are linked, and progress is visible from the first minute.

WHY IT MATTERS

Zero setup	**Starts where you work**	**Nothing slips**	**Linked to contracts**
The workplan is built for you, not by you.	Request it in Slack. No new tool to open.	Every task has an owner, a due date and a status.	The deal's contracts sit with the work.

Chamelio

Act as you track.

Matter management is now in Chamelio.
Track & Act on your own matters.

Book a demo



Socure™

"Moving everything we do, all of our legal work into Chamelio was really life-changing for pretty much all of our lawyers and our team."

Aviad Levin
General Counsel at Socure

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