LuMay AI

Governed AI for the Business of Law

From Intake to CA$H

Six purpose-built AI products for the legal workflows that help firms capture demand, assure work product, protect earned revenue, improve billing operations, enforce client rules, and use trusted 3E intelligence.

- GOVERNED
- EVIDENCE-FIRST
- HUMAN-CONTROLLED

1. CAPTURE 2. ASSURE 3. PROTECT 4. OPERATE 5. COMPLY 6. UNDERSTAND

WWW.LUMAY.AI

GOVERNED EVIDENCE-FIRST HUMAN-CONTROLLED ENTERPRISE-READY

SIX PRODUCTS
ONE GOVERNANCE MODEL

LuMay Legal brings governed, evidence-first AI into six workflows that shape firm growth, risk, and cash. Each product works with existing systems, preserves human decision rights, and shares one governance model.

01. CAPTURE

Intake Flow

Turns inbound personal-injury leads into attorney-reviewed matters and carries approved evidence through records, demand preparation, and settlement support.

02. ASSURE

Virtual Paralegal

Verifies citations, quotations, pincites, proposition support, and authority treatment against approved sources — then routes evidence and exceptions to a named attorney.

03 · PROTECT

BillingGuard

Determines invoice, timekeeper, rate, approval, and evidence readiness before e-billing submission; quantifies blocked value and assigns every exception.

04 · OPERATE

BillingOps

Turns governed 3E and Microsoft Fabric data into evidence-backed answers, forecasts, and recommended actions across realization, billing risk, collections, and cash.

05 · COMPLY

OCG Compliance

Converts client Outside Counsel Guidelines into approved rules, validates timecards and proformas, and uses rejection history to improve prevention.

06 · UNDERSTAND

Metrics Insights

Lets business users ask governed questions across approved 3E reports, KPIs, metrics, and measures without changing authoritative definitions.

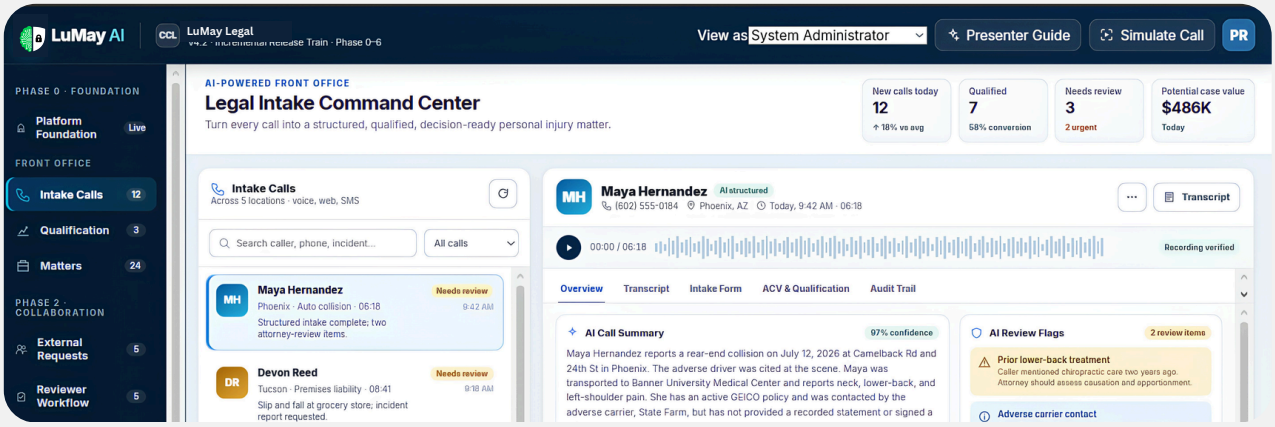
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01. PERSONAL INJURY WORKFLOW

INTAKE FLOW

From first contact through demand and settlement support - one governed evidence and decision chain.

24/7 Intake | Structured Facts | Qualification / ACV | Matter Activation | Evidence & Records | Demand & Settlement



WHAT IT DOES

- Captures voice, web, and SMS intake with transcript-linked facts.
- Applies firm-defined qualification and case-evaluation rules, with attorney review.
- Coordinates secure requests to clients, insurers, providers, and witnesses.
- Indexes records, builds chronologies, reconciles bills, and tracks gaps.
- Builds source-cited demand packages only from reviewer-approved evidence.

WHAT IT CHANGES

- More leads are handled consistently, including after hours.
- Attorney triage takes less time because decisions arrive with linked evidence and exceptions.
- Handoffs, follow-ups, and duplicate data entry decrease across teams.
- Accepted matters progress faster toward attorney-ready demand packages.

WHY IT STANDS OUT

One continuous evidence and decision chain: source links, firm rules, reviewer decisions, and audit events travel from the first interaction through demand and settlement support.

BEST FIT

Multi-office PI firms with high lead volume, after-hours intake needs, or bottlenecks across qualification, records, and demand preparation.

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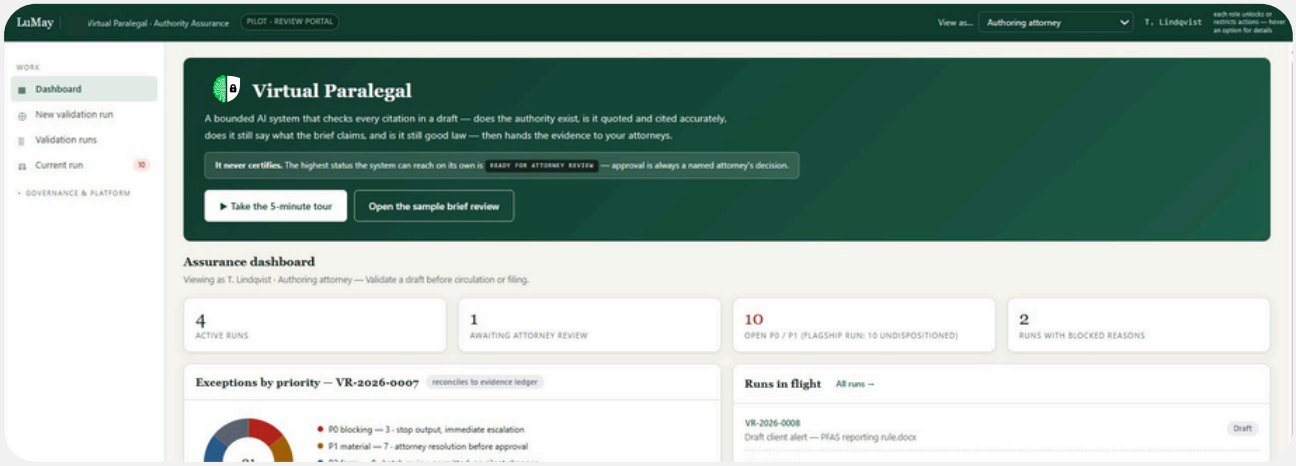
02. AUTHORITY ASSURANCE

VIRTUAL PARALEGAL

Evidence-backed citation and authority review before filing or delivery.

Matter & Policy Gate | Versioned Source Snapshot | Citation Extraction

Approved Sources | Authority Analysis | QC & Attorney Review



WHAT IT DOES

- Verifies citation existence, form, quotations, and pincites.
- Compares propositions to retrieved source passages.
- Evaluates case treatment and later authority while preserving licensed-source signals.
- Checks regulatory currency and as-of-date changes where configured.
- Produces a redlined DOCX, authority audit, exception report, and filing gates.

WHAT IT CHANGES

- Repetitive source retrieval and mechanical checks move earlier.
- Citation, quotation, and treatment risks surface before filing or delivery.
- Review becomes consistent around versioned rules and an approved source hierarchy.
- Reason codes, attorney decisions, and audit history remain defensible.

WHY IT STANDS OUT

No source means no conclusion. The automated ceiling is READY FOR ATTORNEY REVIEW — approval stays a named attorney's decision.

BEST FIT

Litigation, appellate, regulatory, and knowledge teams reviewing high-stakes briefs, opinions, filings, and recurring authority sets.

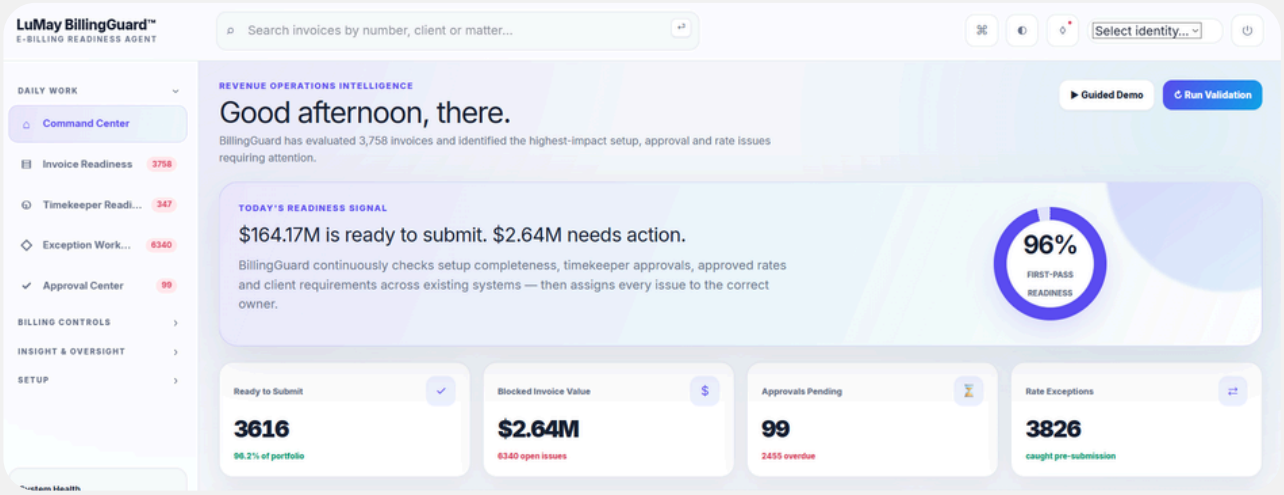
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03. E-BILLING READINESS AGENT

BillingGuard

Know what is ready to bill, what is not, why, how much money is affected and who needs to act.

Read Billing Data | Validate Rules | Score Readiness | Quantify Exposure | Assign & Resolve | Revalidate



WHAT IT DOES

- Checks invoice and timekeeper readiness before e-billing submission.
- Validates approved rates, effective dates, eligibility, approvals, and evidence.
- Connects client- and matter-level eligibility with a controlled monitor-to-enforce rollout.
- Provides exceptions with severity, owner, blocked value, age, and supporting evidence.
- Reports ready value, blocked value, top issues, and approval aging.

WHAT IT CHANGES

- Avoidable rejection cycles are caught before invoices reach the client.
- Ready invoices release faster because they separate from action-required invoices.
- Teams prioritize issues by financial exposure instead of working queues blindly.
- Ownership and auditability become clear across billing, rates, and approvals.

WHY IT STANDS OUT

BillingGuard connects invoice, timekeeper, rate, approval, and evidence status in one readiness decision. It quantifies blocked value, assigns ownership, and works as a governed control layer across 3E and e-billing platforms.

BEST FIT

Law firms with high e-billing volume, multiple client platforms, complex rate or timekeeper approvals, or recurring rejection and resubmission cycles.

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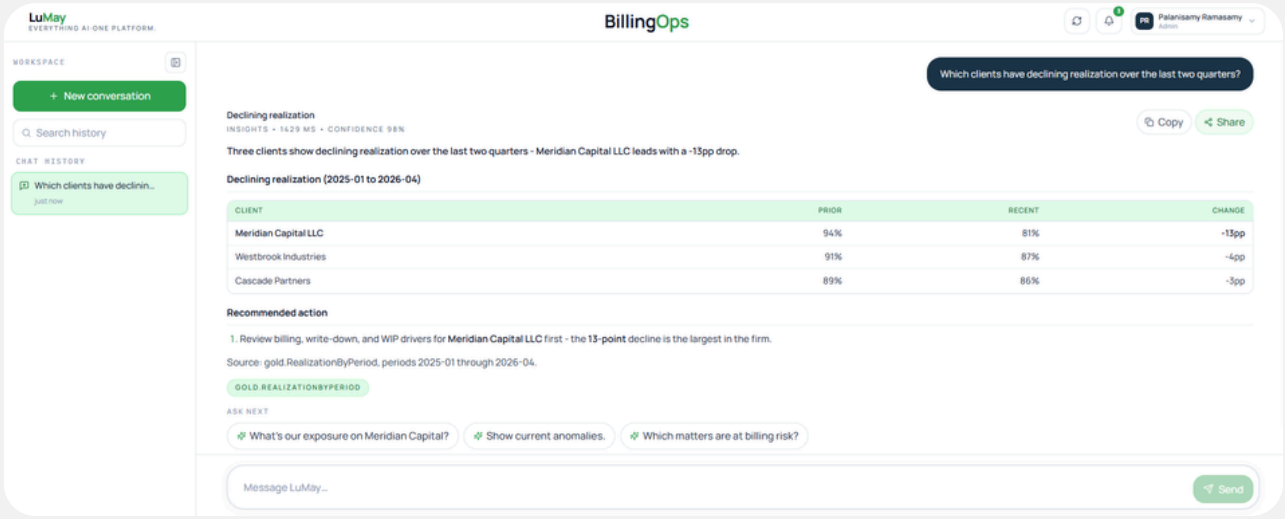
04. BILLING OPERATIONS INTELLIGENCE

BillingOps

Ask. Verify. Act. Turn governed billing data into an evidence-backed answer and next action.

3E & Legal Data | Microsoft Fabric | Ask In Plain Language

Evidence-Rich Insight | Recommended Action | Share & Follow-Up



WHAT IT DOES

- Answers plain-language billing and finance questions with conversation history.
- Provides guided analyses for realization, billing risk, collections, cash flow, and forecasting.
- Shows evidence tables, metric definitions, confidence metadata, and named sources.
- Recommends actions and follow-up questions for root-cause analysis.
- Supports governed 3E-to-Fabric setup across synchronization, lakehouse, and semantic models.

WHAT IT CHANGES

- Business questions reach usable answers faster.
- Realization decline, billing risk, and collection issues surface earlier.
- Finance leaders gain clearer receivables and forward-cash visibility.
- Recurring performance analysis requires less analyst intervention.

WHY IT STANDS OUT

Not a generic data chatbot: every answer arrives with supporting numbers, definitions, source context, confidence, a recommended action, and a guided path to the next question.

BEST FIT

CFO, COO, finance, pricing, billing, and collections leaders at Elite 3E firms that need faster action on realization, WIP, AR, collections, and cash forecasting.

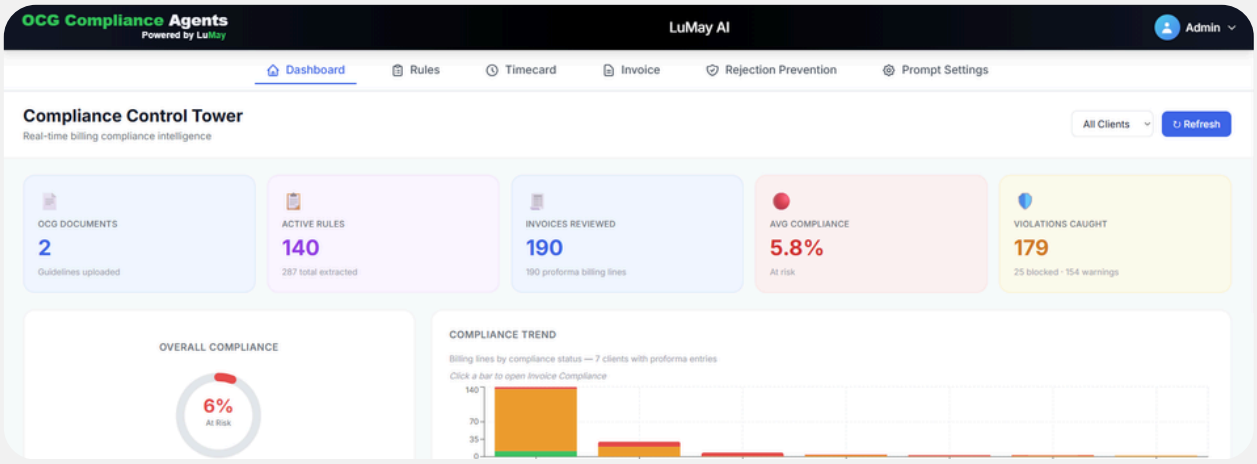
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OCG COMPLIANCE

Turn client billing guidelines into governed, proactive pre-bill controls.

OCG Document | Extract & Review Rules | Timecard Check

Proforma Check | Rejection Prevention | Continuous Tuning



WHAT IT DOES

- Extracts structured, reviewable billing rules from client OCG documents.
- Governs rules by client, category, version, effective date, confidence, and approval status.
- Validates timecards before invoicing and proforma lines before submission.
- Detects rate caps, block billing, vague narratives, staffing, expense, and approval violations.
- Uses rejection and write-off history to prioritize what to prevent next.

WHAT IT CHANGES

- Avoidable client rejections fall through earlier exception detection.
- Rework and write-off exposure decrease across rates, narratives, staffing, and expenses.
- Reviewers focus on blocked items, warnings, and high-risk clients.
- Client requirements apply more consistently across matters and billing teams.

WHY IT STANDS OUT

Closed-loop compliance: approved guideline rules define the standard, pre-bill validation tests upcoming work, and rejection history continuously improves which risks are surfaced first.

BEST FIT

Billing, revenue operations, pricing, and legal-ops teams managing large OCG portfolios, decentralized billing teams, or recurring guideline-related rejections and write-offs.

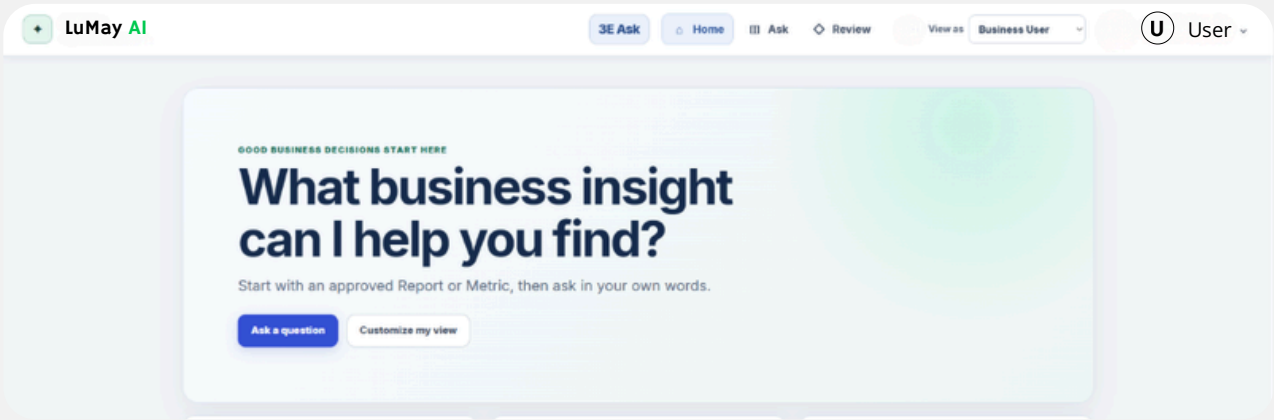
06. GOVERNED CONVERSATIONAL BI

METRICS INSIGHTS

Self-service answers from approved 3E reports and metrics — without changing authoritative definitions.

Approved Report or Metric | Measure Context | Ask in Plain Language

Governed Answer | Review Signal | Role-Aware Outcome



WHAT IT DOES

- Provides an Ask workspace with chat history and approved report or metric selection.
- Suggests supported questions based on available measures and definitions.
- Displays the metric definition, version, answer status, source, and caveats.
- Personalizes questions and views without changing governed values.
- Provides role-aware review signals to acknowledge, assign, or escalate.

WHAT IT CHANGES

- Business users answer recurring questions faster without bypassing governance.
- Approved definitions reduce ambiguity and align teams.
- Supported analytical patterns become discoverable and reusable.
- Analysts focus on unusual movements and higher-value investigation.

WHY IT STANDS OUT

Governed first, conversational second. Users can change the question and view — not the authoritative metric, formula, semantic model, or stored result.

BEST FIT

Finance, billing, collections, pricing, practice management, and executive teams that rely on approved 3E reports and need trusted self-service answers without unrestricted data access.

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LEADERSHIP **TEAM**

LuMay is led by enterprise technology, legal operations, AI, product, and delivery leaders with experience building and scaling secure platforms, global teams, and complex transformation programs — including more than 16 years building Elite 3E, the platform at the center of this portfolio. The team combines architecture, governance, product strategy, implementation, customer success, and AI enablement to take governed agents from pilot to production.



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Director, AI Product Enablement,
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Start where the business case is clearest.

Prove one workflow. Expand on the same governed foundation.

01 Select the pressure point

Choose the intake, work-product, billing, or data workflow with the clearest measurable friction.

02 Run a governed pilot

One product, real data, firm rules and named reviewers — with the audit trail on from day one.

03 Scale what works

Reuse the same governance, roles, evidence model, and integrations across the next workflow.

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