

Legal Matter Management

Track and manage legal matters, cases, and workflows with real-time visibility across legal operations.

Specification

SKU	BUS-LEG-MAT
Solution area	Business Operations
Works with	Legal Requests & Intake, Contract Lifecycle Management (CLM), Vendor & Supplier Management
Updated	Sep 26, 2026
Datasheet	v1.0

What it is

Legal Matter Management is the process of tracking and managing legal work, including cases, advisory requests, disputes, and investigations. It provides a structured system for organizing, executing, and monitoring legal activities across an organization.

SmartSuite's Legal Matter Management solution provides a structured, scalable system to track and manage all legal work across the organization. It enables legal teams to move from fragmented tracking and email-based coordination to a centralized, governed system of record.

With a centralized matter system, legal teams gain full visibility into workload, status, and outcomes across all legal activities.

Core capabilities

Matter & Case Tracking Manage all legal work in a centralized system.	Task & Workflow Management Track tasks, deadlines, and progress within each matter.	Document & Evidence Management Store and manage legal documents and case materials.
Collaboration & Communication Tools Coordinate work across legal and business teams.	Integration with Contract & Legal Intake Connect matters to related requests and contracts.	Compliance & Risk Tracking Align legal work with governance requirements.
Audit Trails & Activity History Maintain full traceability of all legal activity.	Real-Time Dashboards & Reporting Monitor workload, status, and performance.	Role-Based Access Control Ensure secure and controlled access to sensitive data.

The Legal Matter Lifecycle

Step 1 Initiate Matter Create matter from legal intake or internal request.	Step 2 Define Scope & Assign Ownership Set responsibilities and timelines.	Step 3 Execute Legal Work Manage tasks, documents, and collaboration.	Step 4 Monitor Progress & Risk Track status and identify issues.	Step 5 Resolve & Archive Close matter and retain documentation for future reference.
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Who it is for

Legal Teams (General Counsel, Legal Ops) Manage cases, matters, and legal work.	Compliance Teams Track investigations and regulatory matters.	Procurement Teams Collaborate on contract-related matters.
Business Stakeholder / Requestor Participate in legal workflows and reviews.	Executive Leadership Monitor legal workload and risk exposure.	Operations Teams

Works with

Legal Requests & Intake Initiates matters and requests.	Contract Lifecycle Management (CLM) Supports contract-related work.
Vendor & Supplier Management Tracks third-party-related matters.	

Built differently. Legal Matter Management runs on the same relational platform as every other SmartSuite product, so its records link to the risks, controls, issues and evidence they affect, and every report reflects the current state rather than a copy.

See it working with your data

Ask your SmartSuite account team for a demo of Legal Matter Management configured for your organization, or read the full product entry at smartsuite.com/products/legal-matter-management.

Schedule a demo