

TITAN for Legal Teams

Run Client Intake, Engagement, and Approval Workflows Inside Salesforce

Titan runs legal workflows directly in your CRM, delivering clear oversight, controlled approvals, and faster progression from intake to signed agreement.

Legal Pain Points

- ⊗ Client intake begins across inboxes, attachments, and disconnected tools
- ⊗ Contracts move through email threads with inconsistent version control
- ⊗ Review and approval cycles stall across multiple stakeholders
- ⊗ Teams lack clear visibility into status and ownership
- ⊗ Audit trails are difficult to reconstruct across systems



Result: Slower engagements, governance exposure, and operational drag

How Titan Works Inside Salesforce

Structured Client Intake

Clients submit requests through secure, branded forms connected to Salesforce. Conditional logic ensures required details, documents, and confirmations are captured upfront. Submissions write directly to the correct matter or account record with real-time status visibility.

Document Generation and Review

Engagement letters, contracts, and agreements are generated using Salesforce data and standardized templates.

Documents are routed for internal review, redlining, and approval inside Salesforce. Every version remains visible and governed across the lifecycle.



Controlled Approvals and Signature

Approvals follow defined workflows across legal, finance, and business stakeholders. Documents are sent for eSignature and stored on the associated Salesforce record. Completion updates automatically across the workflow lifecycle.



Without Titan

- Email-based intake processes
- Contracts managed across inboxes & drives
- Manual review & approval cycles
- Limited visibility into status
- Fragmented audit tracking



With Titan

- Intake captured directly in Salesforce
- Contracts generated & managed in Salesforce
- Structured review & approval workflows
- Real-time status visibility
- End-to-end governed traceability

Outcomes for Legal Teams

✓ Faster Client Engagement

Matters progress from intake to signed agreement without avoidable delays.

✓ Fewer Errors and Rework

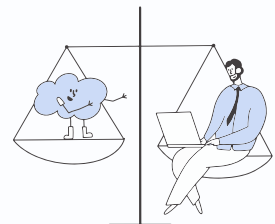
Standardized templates and structured workflows improve consistency.

✓ Stronger Operational Oversight

Approvals, revisions, and execution remain visible across stakeholders.

✓ Audit-Ready Traceability

Documents, approvals, and signatures stay tied to Salesforce records.



The Bottom Line

Titan delivers the governed workflows that move legal matters forward.

Legal workflows require control, visibility, and consistency. Titan provides the execution layer that keeps intake, agreements, approvals, and signatures connected and fully traceable in Salesforce

