

Technology and Better Project Management

#LPSPG2



Introduction

Your Panel

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Project Management v. project management

- ◆ Project Management = a specific set of managerial and organizational techniques designed to improve outcomes in projects (which have a defined beginning and end and are constrained time, funding and/or deliverable requirements)
- ◆ project management = more generalized oversight and control of technical or business processes and workflows, but apart from substantive work in them

eDiscovery and litigation support as a Project?

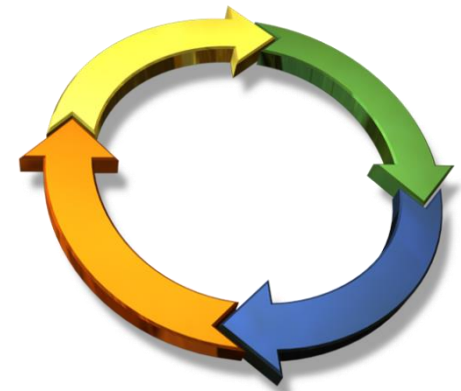
- ◆ eDiscovery/litigation support work is most like a series of bundled and interdependent, but often repeated, processes and workflows, rather than a classic 'Project'
- ◆ Fortunately, Project Management lends us project managers a great toolkit:
 - ◆ OPA: Organizational Process Assets
 - ◆ PIP: Process Improvement Plans
 - ◆ Scope management planning
 - ◆ PMIS: Project Management Information System - our focus!



How will we define project in our context?

Our 'projects' are initiated in a number of ways:

- ◆ Request
- ◆ Engagement
- ◆ Type of service
- ◆ Tasks



Why is Technology Important?

- ◆ Management of project tasks
 - ◆ Increased case/project workload
- ◆ Important to track details
 - ◆ Requests, media, calendar, tasks, metrics
- ◆ Limits liability and risk
 - ◆ Blame who?
- ◆ Provides defensibility of process
 - ◆ Court Imposed!
 - ◆ Have the tough discussion!



Why is Technology Important?

- ◆ Provides a start and stop point
 - ◆ We can impose order on chaos, to a degree
- ◆ Provides a record of the request
 - ◆ Useful for project closure, later analysis



What Technology to Use

- ◆ Core Desktop Programs
 - ◆ DMS; Help Desk, Matter Management, etc.
- ◆ Out-of-the-box software (good luck)
 - ◆ Excel, Access, etc.
- ◆ Relativity
- ◆ SharePoint - Customized solution



Developing Templates

- ◆ Template Development / Customization
 - ◆ Practice Group v. Case Type
 - ◆ Hybrid model
- ◆ Reporting
 - ◆ Metrics
 - ◆ Communicating status at Milestones
 - ◆ Management
- ◆ Accessibility / Responsibility
 - ◆ Case Team v. Litigation Support

Uses of Technology to Track a Project Request

Request

- Phone
- Email
- Text
- Walk up

Department Home > LitSup_Ticket > ILTA Project Request

LitSup_Ticket: ILTA Project Request

Close

New Item | Edit Item | Delete Item | Manage Permissions | Alert Me

Title ILTA Project Request

Body Documents for project "Example" for client matter number [redacted] these documents are being sent via CD/DVD to arrive [redacted]

Assigned To [redacted]

Office DAL

Project [redacted]

Launch Status [redacted]

WorkOrder [redacted]

Service Request Database Creation Document Loading

Priority (2) Normal

Result [redacted]

Ticket_MO 7

Append-Only Comments [redacted]

Log Case / Project

Email ticket created

Update type of service

Assign to Staff

Complete request

Send Notification

Uses of Technology to Track Media items

Media



ItemID	999999.00123-001
Media Type	Flash Drive
Action	Import
Received	8/21/2013
Short Description	Client Electronic files
Description of Media	with client electronic documents collected on August 15th, 2013
Custodians on Media	Log Case / Project
Assigned To	
Status	In Progress
Party	
Num_Files	513
Num_Docs	
Num_Pages	
Num_Copies	Assign to Staff
EvidenceID	
Directory Path:	
BEGDOC#	
ENDDOC#	
Comments	



Best Practices

- ◆ The ‘KISS’ Principle
- ◆ As a process it must be defined and repeatable
- ◆ Technology you select should address the Discovery Workflow

eDiscovery Workflow Checklist

Technology solutions for managing eDiscovery projects work best when they track these details and perform these functions.

1. Collect Matter Details
 - a. Client/matter number
 - b. Matter style
 - c. Billing attorney (attorney in charge of the client)
 - d. Matter attorney (attorney managing the case)
 - e. Paralegal or Legal assistant
 - f. Litigation/Practice Support (PM/staff assigned)
2. Project Scope
 - a. Identify types of services needed on matter

Questions