

Selecting a Litigation Support Solution

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<http://ilta.cnf.io/sessions/145>

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Panelists

- ◆ Brett Burney - Burney Consultants LLC
- ◆ Stephen Dooley - Sullivan & Cromwell LLP
- ◆ Danny Thankachan - Thompson & Knight LLP
- ◆ Mary Pat Poteet - Moderator - Project Leadership Associates

Agenda

- ◆ How to start
- ◆ Work Flow/Requirements
- ◆ RFP Development
- ◆ Evaluation Process
- ◆ Final Installation Models
- ◆ Q&A (actually - please ask questions throughout the session !!)

How to Start

- ◆ Who did you talk to
- ◆ Who should be involved in the selection process
- ◆ Where did you find information
- ◆ How to develop a plan

Requirements

- ◆ Work Flow/Process Requirements
 - ◆ Use existing materials
 - ◆ Determine areas that can be modified to fit the new technology
- ◆ Business Requirements
 - ◆ Who has input? (how do you solicit?)
 - ◆ Users
 - ◆ IT
 - ◆ Others
 - ◆ What to consider?

RFP Development

- ◆ Writing the RFP effectively
- ◆ Managing the process
- ◆ What issues to consider
- ◆ Who should be involved?

Evaluation

- ◆ Wading through the sea of information
- ◆ How to “grade” the responses
- ◆ Proof of Concept (worthy of an entire session)
 - ◆ What it should entail
 - ◆ Timeline
 - ◆ Common issues

Final selection

- ◆ Models
 - ◆ Internal
 - ◆ External
 - ◆ SaaS
 - ◆ Hybrid
 - ◆ Manage Services

Considerations





- Be sure to include a broad group in identifying pain points and needs/wishes for new system
- Manage Expectations
- Cost Recovery Possibilities
- Industry resources such as the ILTA forum
- “Buy-in” is critical to success
- Open mind to different technologies
- Metrics - review progress for areas improvement
- Process development and Documentation
- Scalability

Polling Results





Indicate which of the following closely resembles your day-to-day role at your firm or organization

CHOICE	VOTES	%	
Lawyer	1	1%	
IT	19	24%	■
Litigation/Practice Support	57	71%	■
Training	0	0%	
Consultant	2	3%	■
Other	1	1%	

Where does your department report?





CHOICE	VOTES	%	
Reports to IT	39	49%	
Reports to Litigation	18	23%	
Other	18	23%	
N/A	4	5%	

Please indicate below the size (amount of personnel) of your firm/organization






CHOICE	VOTES	%	
Less than 100	9	12%	
100 - 500	27	35%	
501 - 1000	24	31%	
Greater than 1000	18	23%	

Does your department bill for work?





Applicable to Litigation/Practice support departments, both for in-house and law firms.

CHOICE	VOTES	%	
Yes, by task	15	17%	
Yes, by hour	60	67%	
Not usually	6	7%	
Not at all	9	10%	

Do you have annual billing requirements?







CHOICE	VOTES	%	
500 - 1000	8	10%	
1001-1500	11	14%	
1501-1750	3	4%	
1751+	1	1%	
No billing requirement	54	70%	

What percentage of work is handled in-house?






CHOICE	VOTES	%	
0-25%	10	13%	
26 - 50%	12	16%	
51 - 75%	28	37%	
75 - 100%	25	33%	

Which of the following value points were the primary drivers for considering a new solution?




While all value points are important, select the top reasons.

CHOICE	VOTES	%	
Increase Profit	5	3%	
Decrease Risk - improve control of process	30	17%	
Satisfy client needs	30	17%	
Expense Reduction	16	9%	
Improve efficiency	49	28%	
Current technology obsolete	42	24%	

If you are currently implementing a new discovery solution, what stage are you in?

CHOICE	VOTES	%	
Investigation/Evaluation	28	40%	
POC/Evaluation a Solution	14	20%	
Implementation	10	14%	
Solution fully installed and improving efficiency	15	21%	
Haven	3	4%	

For your current discovery solution, where is your infrastructure and technology housed?

CHOICE	VOTES	%	
Inside your firm/organization	58	78%	
Co-location (managed by internal staff)	6	8%	
SaaS model - managed by a 3rd party	2	3%	
Hybrid approach	8	11%	