

Exemplar Business Case

Project Name: Selecting and Implementing a Discovery Review Application

Project Sponsor: Litigation Support Team

Project Manager: Team Lead with support of Litigation Support and IT

1. Current Situation

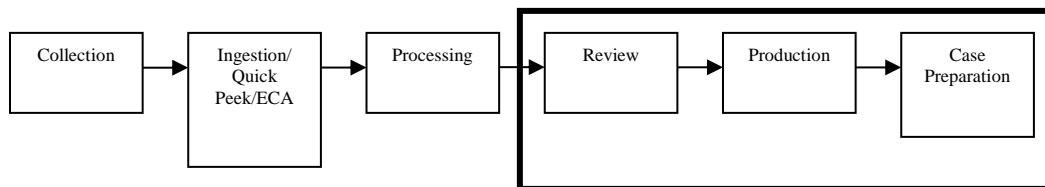
Provide relevant background and describe the problem that needs to be addressed, including previous initiatives, business environment changes and rationale for the project.

2. Project Objectives

State the goals and objectives expected to be achieved as a result of implementing the project. Identify specific and measurable results to be realized and establish the timeframe in which the objectives are expected to be met. Define how progress will be monitored and measured.

3. Project Scope

State the boundaries of the project; specifically identify what work will be included and what work will not be included in the project.



4. Key Stakeholders

Identify business areas that are affected during or upon completion of the project. State how each business area is impacted.

5. Critical Milestones / Project Deliverables

List and briefly describe significant project accomplishments that will act as primary checkpoints for the project's progress. These are generally the points at which the completion of an activity or set of activities produces a highly visible or significant product or result.

1. Assign discovery review application project team
 - a. Develop timeline - Identify subprojects and milestones
 - b. Assign subprojects to responsible team members
2. Onboard IT on project plan
3. Identify in-house Customer Focus group – staff attorneys, legal assistant, attorneys, Litigation Support, IT, and other offices
4. Develop Feature Set matrix for discovery review application
 - a. Categorize features by three categories – Levels 1 – 3. The features are categorized as to importance:
 - i. **1** is mandatory;
 - ii. **2** is NOT mandatory but provides exceptional/quantifiable value; and
 - iii. **3** is NOT mandatory but provides minimal value.
5. Establish project timeline/schedule – including workflow design, application training,

implementation strategy

6. Select Application
7. Go/No-Go decision
8. Develop Workflow
9. Purchase application, hardware, and additional licensing (if needed)
10. Implementation
 - a. POC – Test matter and then small new matter
 - b. Develop templates and repeatable processes
 - c. Increase awareness of apps/internal knowledgebase
 - d. Full-scale rollout of fanfare, training, etc.
11. Project close
12. Ongoing QC/QA - Ongoing Quarterly review of processes and workflow to improve efficiency.

6. Business Benefit

Outline the benefits of this project. Benefits should be both qualitative and quantitative with measurable results.

7. Investment

Briefly state the estimated costs associated with the project and potential ROI

8. Project Resources

Include:

Project team members – types of resources and anticipated work / role required

Consultants – types of resources and anticipated work / role required

Equipment and facilities

9. Critical Dependencies / Related Projects

List any other projects that are affected by the project. Identify tasks within the related project on which this project is dependent and describe the linkage.