

# Implementing a Litigation Support Solution

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# Implementing a Litigation Support Solution

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# Panelists

- ◆ William Kellermann - Wilson Sonsini Goodrich & Rosati
- ◆ David Hasman - Bricker & Eckler LLP
- ◆ Chad Ergun - Gibson Dunn & Crutcher LLP
- ◆ Mary Pat Poteet - Moderator - Project Leadership Associates

# Agenda

- ◆ Software selected
- ◆ Installation (and all that it entails)
- ◆ Considerations

# Software Selected

- ◆ Best fit for the firm
- ◆ Others?
- ◆ Contract negotiation
  - ◆ Purchase or subscription?
- ◆ Budgeting process
- ◆ PM for installation

# Installation

- ◆ Designing the system
  - ◆ Architecture
  - ◆ Security
  - ◆ Storage
  - ◆ Back-ups
  - ◆ Archive/Retention

# Building your system

- ◆ Acquiring the hardware
- ◆ Actual Software Install
- ◆ QA and Testing
- ◆ Migration of data

# After the Install

- ◆ Roll-out
- ◆ Training Plan
- ◆ Lessons Learned



# Considerations





- ◆ Project management/momentum
- ◆ Communication
  - ◆ Within Litigation Support team
  - ◆ End users
  - ◆ Management
- ◆ Process development
- ◆ Documentation
- ◆ Legacy Data Support

# 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%	