

Building Consensus and Driving Change

Litler's Approach to Creating a Case Management Technology Solution



by Scott Forman

They say that necessity is the mother of invention. But for Litler's efforts to build a comprehensive case management system — a sort of Holy Grail in the legal industry — invention was the mother of another invention.

A few years ago I was leading a team to integrate more of our firm's case work into Litler CaseSmart, an award-winning platform launched in 2010 to more effectively and efficiently manage employment matters. Litler CaseSmart had recently added single-plaintiff employment litigation, meaning that cases would be staffed by larger teams working within the Litler CaseSmart model.

Litler CaseSmart has long used an innovative staffing model that involves breaking out the various components of a matter and determining the best method to address each task, whether it is handled by

a shareholder, associate, ediscovery attorney, FlexTime Attorney (FTA), data analyst or paralegal or through technology solutions. This creates a need to ensure seamless coordination and collaboration among case teams, especially with FTAs who work remotely and focus on specific tasks such as brief writing, research, and discovery.

As part of Litler's technology project initiation process, we form committees to gather feedback from a cross-section of affected individuals. Coordination among litigation teams surfaced early as a key area of focus for the new Litler CaseSmart model. This feedback ended up being the genesis of one of our newest technology innovations: Virtual Binder.

Virtual Binder is an internal litigation management network that integrates all of the firm's resources — including email, chat, document management and financial information — in a single-entry network. It streamlines Litler's internal processes, increases collaboration and maximizes efficiencies through automated workflow, better communication management and individual dashboards for each attorney with relevant financial data.

Building a First-of-Its-Kind Technology Solution

As we always do when embarking on a new technology solution, we began with the critical question of whether to build in house or work with an outside vendor. We conducted thorough research and determined that an external solution that met our comprehensive needs did not exist. Fortunately, Litler's robust internal applications and development team was able to take on the magnitude of this project and build Virtual Binder from scratch.

As we started to work with the IT department on the build, we quickly realized that Virtual Binder could be much more than just a case management system. Virtual Binder became a solution to the inefficiencies that come with attorneys and staff spending their days pivoting from email to chat to cloud-based storage systems to resources that track financial data in order to manage litigation matters and serve clients. The automated workflow also enhances quality and consistency by helping ensure that all tasks are captured and completed on time and that case teams are following litigation best practices and proper client reporting.

Getting Past the Initial Hurdles

Virtual Binder's rollout has actually been smoother than we anticipated, but there were certainly concerns in the early stages. The firm had introduced many innovations in recent years, so to minimize the risk of "change exhaustion" we remained hyper-aware of the thoughtful and systematic change management process that needed to take place. Over the years we have learned the necessity of securing internal buy-in and saw the importance of having attorneys and staff embrace Virtual Binder as a means to work smarter and provide greater value to clients.

Here are three key lessons we learned with Virtual Binder:

- 1 Early on, bring people in to be part of the development process. For Virtual Binder, we conducted two years of beta testing with different case teams. Participants realized that their input was valued as they saw it reflected in the lead up to the launch, and now they act as ambassadors for Virtual Binder across the firm.
- 2 Develop a comprehensive communications plan, change management strategy and training program to ensure that everyone at the firm is familiar with and comfortable using the platform. It may seem simple, but we also found it important to keep those involved updated and to report on quick wins so that everyone sees the effort moving along and working.
- 3 Perhaps most important, explain the "why" behind big initiatives. Attorneys and staff need to know that we are undertaking new technology initiatives as part of a larger strategy that benefits them and the firm as a whole. Leaders must be able to show that any new products or solutions can deliver value.

Benefits and Results

Virtual Binder has already proved to be a successful means of managing litigation and enhancing the way the firm serves clients. The firm is on track to handle approximately 350 matters through Virtual Binder over the next year, and the goal is for it eventually to be used firmwide. Its many features and benefits include:

- » **Automated workflow.** The system tracks and manages the life cycle of a litigated case, including informing attorneys of what tasks need to be completed, by whom and when. This provides greater clarity to all team members on their responsibilities and helps ensure that the right person is performing the right task at the right time.
- » **Single environment.** This allows attorneys to access materials related to their litigation matters, including retrieving case-related documentation and information, without having to visit multiple technology platforms and sites.
- » **Better communication.** The system provides features to better manage communication and enhance collaboration on litigation matters, including a Message Center that integrates with attorney email accounts, enabling them to tag, save and search case-related emails and chats as well as locate relevant work product and information from their peers.
- » **Interactive dashboards.** The individualized dashboards provide each attorney with views of his or her entire workflow on litigation matters, along with access to financial data and other key performance indicators and milestones.
- » **Big data.** Virtual Binder becomes a means of centralizing and organizing our data to further build Littler's big data capabilities.

The legal industry is increasingly driven by data analytics and technology. And with clients increasingly demanding more value for their legal spend, Virtual Binder is a key part of Littler's unique and dedicated approach to delivering legal services effectively and efficiently. **P2P**

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