Automating Project Management

Looking for efficiencies as a new department manager, is a goal typically undertaken in a new litigation support role. Aside from getting to know the staff, their strengths, workflows, procedures, standards, client needs, software tools, technology infrastructure, and what more can I do to make your jobs easier?

It was with this frame of mind that I began the investigation in my new role in the law firm. Because the team was focused on providing excellent customer service, and the previous manager had taken a more "hands on" approach, little had been done to improve efficiencies over the years.

It's not atypical to find this as an outsider, looking in with a fresh perspective. Techniques, procedures, workflows, tools, etc. tend to build up over time in a "let's fix it with what we have" attitude without taking a step back to look at it from a holistic approach. Are people being used effectively? Are the tools suitable to the tasks at hand? How is the department being managed, from a technology perspective? What could be improved?

'What could be improved?'

After analyzing the workflow, we discovered one full time position was handling in-bound requests to the department. In effect, they were the gatekeeper, monitoring the group email box of requests from clients. Doing pre-assessment of the requested services, and preparing and entering the preliminary data elements needed to track the requests (setting up storage folders, naming conventions, database creation and user assignment and access rights, requester, client, matter, type of service, etc.). Those emails would then be assigned to techs. So, with a combination of spreadsheets, inbox folders, document management system folders, a document review system database, and numerous yellow post-it notes, the current workflow was memorialized. This position was also responsible for the monthly billing preparation and submission to accounting for data entry.

It was complex, strapped together, and inefficient. Something better should be achievable.

'Something better should be achievable'

Few products exist to manage a litigation support / e-discovery department. Typical project management tools (e.g., Microsoft Project, Smart Sheets, etc.) are all project with subtask, resource allocation / dependency and time delivery driven. What was needed was a comprehensive "request tracking tool" and again typical IT Help Desk solutions don't fit the bill.

Luckily, I was able to stumble onto Agility Blue from Sadie Blue Software. A system not only designed to manage an in-house litigation support department but was in fact being used by the vendor themselves to run their operation. It's helpful to know product developers eat their own dog food (pun intended since Sadie Blue's mascot is a beautiful dog).

With the help of Sadie Blue's in-house developer, we made quick work of customizing the system which is incredibly flexible. Historical data was gathered and loaded into the system, and techs were trained within a couple of hours. Any custom reports were either already there, could easily be generated from their flexible "data grid template" scheme, or were created in days by the developer. We went operational within a month of first discovering the tool.

What this meant was new requests could easily be entered, or even submitted by the clients themselves via Agility Blue's portal feature. Requests were retrieval by client, matter, requestor, type, etc. Techs could see tasks assigned to them, enter updates as the service progressed, and report results back to the client via the flexible "share template" features of Agility Blue.

As the manager of the department, Agility Blue provided a top-down drill into the details and a view of what was going on in the department. And, from a historical investigative perspective all of the data was available within easy reach (what was that last request, who'd it come from, when was it finished and by whom, last bates#, production specifications, etc.). Again, through the dynamic grid template view mechanism, I could quickly see projects in progress, due in X days, or overdue. The flexibility of the reporting mechanism allowed me to turn billing information around in hours instead of days. Reporting to upper management was also greatly enhanced since any of the data is easily exportable to Excel for reporting and graphing.

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Agility Blue allowed me to modernize the department, improve efficiency, create better reports and analyze "what we're doing, by and for whom". With the departure of the project manager, we did some reassessment and made the decision that instead of a full-time project manager, we needed an additional tech to perform work and generate additional billable revenue. Agility Blue allowed that to happen. Employees overwhelmingly agreed Agility Blue was far better than the ball of twine systems approach taken up to this time. Faster turnaround, improved accuracy of service deliveries, better reporting, and the ability for clients to self-service via the portal are some of the features that continue to make Agility Blue a success for us. Multiple systems (Outlook folders, DMS, spreadsheets, those post-it notes, etc.) and repetitive entry of data was also eliminated, allowing the staff to focus on client service rather than "where is that piece of information".

About the Author

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With over 30 years of experience in E-Discovery and legal, Wade developed ENF on the principle that E-Discovery production delivery standards are outdated, and a new format specific to the E-Discovery field was needed. Wade continues his entrepreneurial spirit with the formation of another new endeavor (Stock Trading Edge) to develop tools for stock traders, his DisAlert application assists Discord users with real-time alert notifications