

SOLID West

Implementation Process- What you need to Know

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Problem: Data Maturity Varied Widely

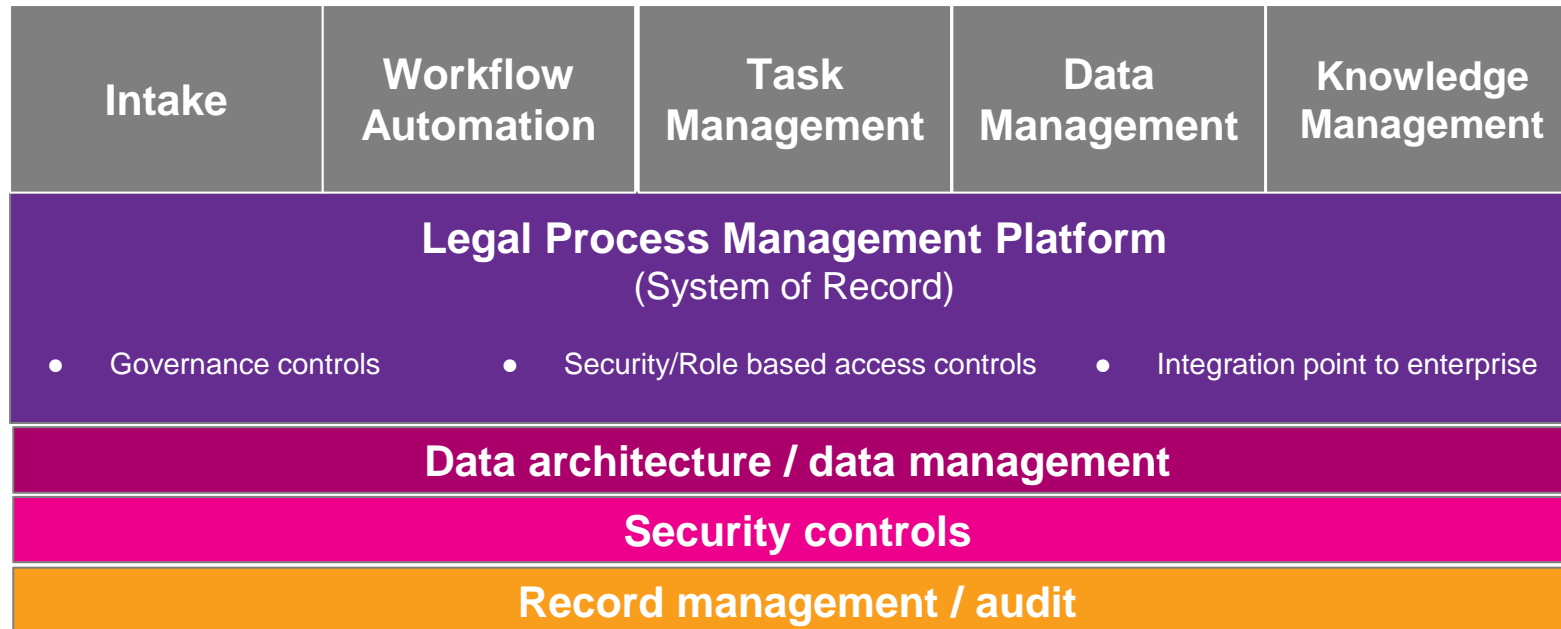
Inconsistent approach meant inability to audit, automate, track, and secure

	Data Systems	Data Architecture	Data Hygiene	Consistent KPI
Commercial	●	●	◐	◐
Litigation	◑	◑	◐	◓
Ethics & Compliance	◐	◐	◓	◐
Employment	◓	◓	◓	◐
Operations	◑	◑	◑	◓
Corporate	○	◓	◓	○

Existing processes and systems had developed organically, resulting in a hodgepodge of approaches and solutions. Many typical legal processes were handled by a combination of email, Slack and phone calls, negating any ability to understand volume or articulate value.

Solution: Legal Process Management

Implement a Legal Process Management Platform (LPM) as a foundational system that could support Intake, Automation, Task Management, and Knowledge Management



Candidate Categories

Platforms - Single end-to-end solutions; typically owned by enterprise IT

Legal Specific - Purpose built, third party solutions

Best of Breed / Hybrid - Different solutions for different layers

Considerations:

- Cost - If the system is already being used by the enterprise, are there savings?
- Support models - Who can maintain and enhance?
- Autonomy of choice - Can attorneys stay in the systems they use today?
- Acceptance - How to best drive adoption?

Score Card

		[Redacted]				[Redacted]				[Redacted]			
	Functional Criteria	Points	Weighting	Total	Critical or High Reqs Not Met	Points	Weighting	Total	Critical or High Reqs Not Met	Points	Weighting	Total	Critical or High Reqs Not Met
15%	Intake	2170	15%	325.50	0	2200	15%	330.00	0	1740	15%	261.00	2
20%	Task Management	805	20%	161.00	1	1050	20%	210.00	0	860	20%	172.00	2
20%	Automation	800	20%	160.00	0	750	20%	150.00	0	200	20%	40.00	4
10%	Knowledge Management	-	-	-	-	-	-	-	-	-	-	-	-
	Content Management	750	5%	37.50	1	1050	5%	52.50	0	900	5%	45.00	1
	Content Indexing / Searchability	300	5%	15.00	1	670	5%	33.50	0	400	5%	20.00	1
20%	Data Management - Reporting / Analytics	240	20%	48.00	0	280	20%	56.00	0	180	20%	36.00	1
15%	General System Governance, Administration & Maintenance	-	-	-	-	-	-	-	-	-	-	-	-
	User Management	700	4%	24.50	0	760	4%	26.60	0	600	4%	21.00	1
	Administration	800	4%	28.00	0	800	4%	28.00	0	400	4%	14.00	4
	Implementation & Ongoing Support	800	4%	32.00	0	800	4%	32.00	0	700	4%	28.00	1
	Platform Security	375	4%	13.13	1	500	4%	17.50	0	500	4%	17.50	0
100%	Total	7740	100%	844.63	4	8860	100%	936.10	0	6480	100%	654.50	17
	Include in Short List	<input type="checkbox"/>				<input checked="" type="checkbox"/>				<input type="checkbox"/>			

Bidder Comparison

Finalists



Pricing Model (Annual)	[Redacted]		
Impact on Business	Minimal - Allows teams autonomy of choice	Significant - Consolidates into single system of record	Significant - Consolidates into single system of record
Existing Relationship	No	Yes Several teams use system, including engineering, IT	Yes Litigation uses system
Support Model	Minimal - Maintain annual bank of PS hours in support, but most workflows and systems supportable by legal ops.	Significant - Dependent on vendor for workflow creation and maintenance as well as additional apps to automate workflows.	Significant - Would need partner to implement and support. Legal would be dependent upon IT resources and prioritization.
Team Feedback	Positive. Using [Supplier] would require decision tree in supporting tech stack, e.g., [Supplier] on top [Supplier].	Negative. Consensus to not move forward with vendor, but open to exploring additional products more.	Positive. Good capabilities and breadth, but concern about dependency on partners.



[Logo Removed]

Recommend [Supplier]

Why?

- **Pricing** - Most cost effective
- **Team choice autonomy** - Allows attorneys to choose or stay in key systems
- **Drive adoption and reduce friction** - Teams will see minimal disruption
- **Support model** - Allows legal operations to own ongoing development and support so we are not dependent on partner/other teams

Bonus - Most enthusiastic to win our business

Thank You!