

By-Lined Article

IFRAMEWORK ELEVATES PROJECT MANAGEMENT

By Laura Bandrowsky

December 4, 2009

Legal Tech Newsletter

Duane Morris' Practice Support Department is constantly challenged by tight deadlines, tight budgets, numerous processes that require extensive planning and project management, and let's not forget the element of stress that comes with anything tied to the word "litigation." The firm has advanced technologically over the years and operations have grown along with it. The Practice Support Department has long recognized the importance of project management to promote cost containment strategies and to ensure compliance with discovery requirements during the discovery phase of a litigation case. While the firm developed its own sophisticated project management database, the newly implemented [iFramework](#) software takes project management to a higher level. It provides a wide variety of options for implementing individualized best practices for specific law firm or legal department needs. The level of project management afforded by iFramework promotes consistent, standardized, repeatable results, and at the same time, provides the ability to monitor costs to contain them at every phase of the project.

Project Management Challenges

One of the more recent project management changes for the firm is from more traditional processes to electronic ones. Our Litigation Support Department made a necessary move away from using multiple systems, such as paper, e-mail inboxes and folders and/or Excel files, and began implementing centralized, online, real-time technologies that include integration with processing tools and online review platforms that can be accessed from one centralized project management system. iFramework's project-based workflow solution is used to help improve visibility and track data acquisitions, data processing and document review from within projects. The Litigation Support Department benefits by optimizing resources, building efficient processes and solving many complex project management problems.

Although the IT department had developed a very sophisticated Access database to manage the firm's products, which had worked well for a number of years, we appreciated the value of moving to the iFramework project management tool because of the more comprehensive utilities it provides.

It is extremely important to consider many factors when implementing a project management tool because it is going to affect everyone who is involved in many projects: partners, associates, paralegals, clients and vendors. We began looking at iFramework for numerous reasons. Mainly because the project-management solution was focused specifically to litigation support, it enabled us to share all of the details in one centralized tool, identify which projects are most critical and to help execute projects as efficiently as possible. We also found the software as a service-based offering more affordable, faster and easier to deploy than locally installed ones.

The evaluation and implementation of a new software tool can be a time-consuming exercise, so it's a requirement that the results we expect to achieve are considered and documented. To achieve our project-management software implementation goals, all of the users in our department were part of the evaluation. We followed a four-step process:

1. **Defining Objectives:** A written statement of objectives helped to define the scope of the project and was used to evaluate its success on completion.
2. **Identifying Costs:** To assess the full cost of the project, we included initial costs, the ongoing support costs and the cost of customizing the tool, if necessary. Items that may need to be considered are: hardware, hardware maintenance, software license or subscription fees, software support, implementation, administration, training, upgrades and enhancements.
3. **Defining Requirements:** Documenting requirements helps to evaluate the alternative options and provide software vendors an understanding of our needs. Areas that were covered in our requirements specification document were: a) background on our department; b) specifics on what we wanted the tool to do and classifying requirements into must-haves, desirable items and future use; c) type of hardware, operating software and database the tool must use; d) the assistance that will be provided and what training will be included; e) support, help desk and on-site assistance; and f) details about the software company (size, length of time in business, etc.), future plans and objectives to ensure the tool is moving forward in a way that suits our objectives.
4. **Evaluating Options:** Assessment of written responses to our requirements specification documentation, arranging for a web demonstration, and contacting references.

Project Framework and Templates

When first approached by iFramework, we had already developed our own project-management system and were not looking to evaluate a new tool. After we managed two pilot projects through the software, we quickly realized that the capabilities that come standard with the system were far more comprehensive -- and it would cost more to develop new enhancements to our systems versus investing in iFramework. The value we find in iFramework is that it enables our Litigation Support Department to create best practice workflow templates that can be repeatedly used on all future projects, saving us time from not having to reinvent processes, and projects are kicked-off and completed more quickly. In iFramework 5.0, we see advanced project-management integration and improved productivity tools, such as dashboards, which add instant visibility into the projects.

Software Integration

With the release of Version 5.0, iFramework integrates with Trident Pro processing software to allow for greater visibility into the discovery lifecycle, as Trident Pro filters and culls discovery data (in-house or by a vendor), including foreign language documents, PSTs, NSFs and loose files. Trident Pro allows us to easily remove duplicate or near-duplicate data prior to review; Trident can sometimes reduce review sets up to 70 percent. iFramework can provide near real-time metrics on the tasks being performed within Trident Pro. This integration allows litigation support to better control projects and data, and meet deadlines because the metrics of the projects being processed are easily accessible and continually updated within a particular project in iFramework. Users have access to project data, down to a custodian level, including processing status, volume and speed. Users have the ability to track multiple instances of their processing software, running on the same or varied projects, all from one centralized location that also integrates with the tracking of team members, tasks, calendars, e-mails, production logs and media.

Building and Expansion of Workflow Tools

Since the implementation of iFramework, we have begun to use more of the templates from the comprehensive library of best practice workflow tools. The Litigation Support Department has benefited by quickly editing and modifying the workflow templates to our unique processes or using many of them as is. The workflow designer module allows all different types of users to use the same workflow templates, creating consistent and repeatable processes for the entire team. We no longer

miss the lack of workflow standards among litigation support professionals in our department. iFramework makes it much easier and faster for our team to create and establish an action plan for each project.

Custom Reporting Feature

iFramework's SQL Server Reporting Services enables the Litigation Support Department to create their own custom reports and then export them to common file formats such as Excel, CSV, PDF, TIFF and XML. We often run reports on Media Tracking, Vendor Costs by Project, Open Tasks by Project and Gantt Charts by Project.

Wiki Enables Collaboration

The new iFramework Wiki enables more collaboration among our team members. We share knowledge and experience across our department. The Wiki can continuously be used to compile beneficial information and include hyperlinks to internal and external information. Our Wiki contains a lot of information on vendor management and department policies and procedures.

Human Resources Maximized

Current economic conditions have increased the pressure for the Litigation Support Department. We had to establish priorities on improving efficiency, controlling costs, profitability, effective use of resources, and essentially, doing more with less. As resource constraints have impacted our department, implementing an automated and centralized framework to manage projects has become a necessity.

iFramework Investment

Initially, we developed our own project management system because there wasn't a solution available to purchase that was specifically designed for our Practice Support Department. Plus, we have personnel with the proper skill sets to develop these tools in-house. Based on the initial low investment and projected long-term cost savings, we feel iFramework software will provide the best ROI for the firm. Most savings will derive from iFramework being responsible for software upgrades and technological advancements that will stem from feedback received from a large user community of litigation support departments. Being a part of iFramework's project management user community allows us to focus more on our specialty of litigation support, enabling the firm to achieve favorable results.

Since the implementation of iFramework, we have seen a reduction of dependence on Microsoft Excel spreadsheets, e-mail inboxes and manual or paper-based processes. Our team has improved collaboration capabilities, real-time project tracking and status reports, and thus improved overall project outcomes. If you have a Litigation Support Department that needs standardization and better project management workflow tools, you should consider iFramework and Trident Pro.

Laura Bandrowsky is practice support director at Duane Morris LLP. She has been advising on the use of technology to support the practice of law and manage complex cases for over 25 years. Bandrowsky is a member of The Sedona Conference Working Group on Electronic Document Retention and Production. She frequently speaks on topics related to the technological aspects of the legal profession. The author gratefully acknowledges the assistance of Litigation Support Manager Michael Krueger in the preparation of this article. For more information on these products, go to www.i-Framework.com or www.discoverthewave.com.

This article originally appeared in the *Legal Tech Newsletter* and is republished here with permission from law.com.