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Using Legal Project Management to Organize Data Capture, Enhance Collection, and Expedite Strategic Decisions

Authors: David A. Rueff, Jr., Brian C. Pike
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You may have heard the adage: Data is as good as you make it. The necessary corollaries are that its capture must be natural, and its usefulness must be readily apparent to both clients and the team. In short, good data can reveal problems and trends early, allow teams to allocate resources more efficiently, avoid waste, promote accountability and inform quicker strategic decisions.

A client recently approached Baker Donelson with a potentially large, difficult portfolio of cases centered in a specific geography. While our team possessed the necessary subject matter expertise, we had limited experience managing this type of engagement for the client. The portfolio involved commoditized litigation with similarly situated plaintiffs and claims, procedural tactics, and litigation strategies. We agreed to manage the engagement under an alternative fee structure and recognized that controls and monitoring were critical to ensure our ability to manage to the fee.

Onboarding a new portfolio of litigation provides a unique opportunity to design a holistic approach which integrates legal project management (LPM) techniques, technology-driven workflows and enhanced data collection. Data collection can include customized time entry, broader matter profiling, assignments, duration, milestones and outcomes. This information greatly enhances data visualization and reveals trends that may be impacting the portfolio and the client's legal spend. The secret, however, is that the legal team must be engaged to track their own assignments, regularly update progress and enter key matter and task data points within the system.

Our approach with this new assignment initially involved using our legal research tools to quantify the typical procedures involved in these cases. We used that information to map out the progression of anticipated tasks and identified proper sequence, optimal resources and estimated time allocations. We added to this model other data points such as expanded matter profiling, time entry and ongoing assignment tracking, milestones and outcomes. This early work formed the foundation of our customized technology solution and was rolled out within weeks of our receipt of new cases.

After only three months of implementing this approach, we have realized the following results:

- The team is engaging with the system to manage their work, both from the standpoint of accessing resources and tracking assignments.
- The team is capturing specified data to profile matters and assignments.
- Our team is better positioned to track volume and complexity and more quickly gauge the need for additional or fewer resources.
- We are positioned to quantify the volume of assignments, the level of effort and skill required by assignment and increased efficiencies month-to-month.
- We are capturing the level of oversight and administration related to managing a large litigation team and are seeing a downward trend month-to-month as the team gets more efficient.

This information has been incorporated into a regular reporting regimen for the client. By combining information from 1000+ cases on opposing law firms, procedure and assignments, and the other data points identified above, in-house counsel now have a strategic lens into the portfolio after only a few months of operation. This has allowed the client to make expedited decisions about their own strategy in order to reduce the annual legal spend for management of the portfolio. Data-driven approaches such as this, which are practical and focus on early wins, will continue to be an important focus not just in litigation portfolios, but in all areas of legal practice.