You Might Have a Litigation Management Problem If...

by Dave York

Dave York
VP, Client Services

Timing. They say it's everything.

I've never been one at the forefront of pop culture and the latest trends (is Macarena still a thing?), so organizing an article based on a 25+ year old Jeff Foxworthy comedy album seems pretty in line with my bio. It's really all about timing.

You see, my oldest daughter recently discovered Foxworthy's "You Might Be a Redneck" comedy, so naturally that tied in perfectly with me writing about Litigation Management. Or at least that is how I end up structuring my thought process around a comedy bit I first heard in the 1990s.

Just as Jeff Foxworthy's comedy hit a little too close to home for me with my Southern roots, there may be a few points below that strike a chord with your current legal and litigation data landscape.

But that's okay – we've got your back, and you certainly aren't alone. So let's get started...

You don't know what to call it, but you have lots of names for it...

Then you might have a Litigation Management problem. It often goes by many names - enterprise legal management, litigation management, case management, matter management, legal entity management, legal billing, legal spend, claims management, e-billing, and many more that I know I left out. But in the end, it is all of those functions that impact corporations and law firms alike, perhaps in different but related ways. We tend to compartmentalize each of these, which results in multiple tools in use, redundant data, and dispersed document populations.
Understanding the entire landscape of what you have and what it is needed for, where it is located, and at the very least, what to call it, are all important areas of focus when looking at your Enterprise Legal Management solution. At its core, it's all just data and documents, but not being able to see across the entire universe that is important to you in your role can be frustrating and costly. Knowing what to call it and what it means, can at least get you on the right path to understanding where you need to go next.

You've yelled at least once, "Who has the spreadsheet open?!"...

Then you might have a Litigation Management problem. In full disclosure, I've been guilty of this far too many times. And as embarrassing as it is to admit, solving this issue for clients is a key part of my job, but it's always easier to identify and fix

someone else's problem than your own.

Throughout our company's 30+ year history we've seen it all when new clients come in the door with their current Litigation Management solutions (and sometimes lack thereof) - dozens of platforms with duplicative data; spreadsheets that make it look like people are paid by the number of tabs they can create; Access databases that only Bob understands (but Bob is on vacation this week, so it will have to wait); and then there was that one client's Word document that pushed the technical bounds of what should have been possible in a single file. They all deserved an 'A' for effort, and while they may have served as band-aids for very specific needs, they didn't address the overall problem.

I love spreadsheets as much as the next person, but a single file can't replace a secure central repository for searching, reporting, and managing all of your documents and data while collaborating with internal colleagues and external team members. Just because that shared XLS "does the trick now", doesn't mean it will be able to keep up with your increased data and document demands.

In the case of our CVLynx platform, the increase in the volume and types of data is one of the main factors in our Case Management functionality of the 1990s growing into a broader Litigation Management solution, with the next phase being true Enterprise

Legal Management. The problem we are helping solve for corporations and law firms continues to grow, and our technology has had to adjust as client needs demand. So don't settle for that spreadsheet or the patch quilt tools you have in place.

All you wanted is to get the information on Todd, but you can't…

Then you might have a Litigation Management problem. Wait, did you mean our matters in Todd, NC; Todd City, TX; or Todd Mission, TX? Or was it the Jane Todd or Todd Smith cases? No, you meant the info about Judge Regina Todd? Actually, you are probably looking for the expert witness materials for Todd Jones. But I guess it could be the Todd, Todd & Todd LLC firm located near Todd. Todd dang it!

Between case profiles, plaintiffs, claims, claimants, witnesses, individual counsel, law firms, judges, experts, vendors, events and all of the related data, documents and expenses that go with it, you have a lot to keep up with. A good comprehensive Litigation Management solution can help you pull all of this together in a single location, and allow you to get the answers you need without jumping through all sorts of hoops to get there.

Just putting your data into a Litigation Management tool gets you part of the way there. Having a knowledgeable service provider that can help pull all of those various relational elements together so that it is seamless to the end user is what you need to get you and your team across the finish line. Once you've achieved this, it makes getting to the right Todd that much easier.

Your process map looks like a map of the New York City subway system…

Then you might have a Litigation Management problem. When your data and tools get voluminous and unruly it's a little more obvious than when your processes suffer the same fate. Whenever we implement a new Litigation Management solution in CVLynx, we always focus on four key areas: data, tools, people, and processes. The latter can often get overlooked as teams focus on the data they are tracking, the tools used, and the people that utilize them. Frequently the processes that tie everything together are left out.

Working in a company that has adopted Lean Six Sigma (LSS) methodologies and is deeply immersed in a Continuous Process Improvement culture has made me that much more sensitive to the process side of everything that we do. It doesn't mean that you have to go full blown LSS with your Litigation Management approach, but it does mean you need to have a basic understanding of your processes. How do your data and documents get from point A to point B? How do your stakeholders interact with your data and existing tools? Does it take

20 steps or 10 steps to complete a certain piece of work? What are all of those steps costing in time and money?

Sometimes a complex workflow is what you need, but unless you understand your processes and start to ask the right questions, you may never know.

Unlike Jeff Foxworthy, I don't have a clever ending, but I will say this.:

Effective Litigation Management is more than a tool, or a collection of data and documents. It's a partnership between clients, law firms, and vendors to efficiently and securely manage the lifecycle of cases, claims, investigations or any related requests. It's about controlling costs and ensuring defensibility and consistency across your data, processes, tools, and the people that utilize them.

Litigation Management isn't complicated, but inefficiencies and a lack of proper structure and tools can make it more challenging and costly than it needs to be. The good news is all you have to do to make it better is get started. So what are you waiting for? Let's "Git 'er done!" (Dang it! Wrong comedian.)