

# OPTIMIZING PRODUCTIVITY AND CLIENT OUTCOMES

## THROUGH MATTER-CENTRIC COMMUNICATION AND COLLABORATION

### A NEW MEASUREMENT FOR PRODUCTIVITY

Thomson Reuters anticipates a shift in the concept of productivity towards tasks-completed and away from a reliance on hours-entered.\*

Traditional measurements focus solely on the hours a lawyer spends on a case. Thomson Reuters suggests a relative performance measure (RPM) that would align to outcomes of legal work and not solely hours.

\*References:

<https://www.thomsonreuters.com/en-us/posts/legal/law-firm-productivity-metric>

<https://www.thomsonreuters.com/en-us/posts/legal/relative-performance-measures-report-2024/>

**WORKSTORM®**

### Supporting a Productive Firm

Firms must not only think about the future of legal team productivity and its impact on client satisfaction, but also how they will *manage* productivity. The solution is a centralized, secure matter management and collaboration platform that drives optimal outcomes by:

- Improving workflow
- Increasing productivity
- Keeping legal teams and clients informed

As measurements of productivity continue to evolve, effective matter management is no longer a convenience, it is a necessity. This whitepaper explores key components of a productive matter management framework that enhances internal operations and client outcomes.

### Eliminate Tech Silos and Gaps

Integrating secure collaboration within matter management workflows is essential for law firms that need to stay organized, maintain focus, and improve client outcomes. Many legal teams are inundated with overlapping and/or siloed technologies and, consequently, pay a significant toggle tax.

An integrated approach enables legal teams to collaborate seamlessly on tasks, share relevant documents, and track progress on matters in real-time, creating a more structured and coordinated workflow.

As a result, firms optimize operational efficiency, strengthen team cohesion, and safeguard sensitive client data - reducing the likelihood of confidentiality and privacy breaches - by incorporating secure collaboration features into their matter management framework.



## Task Management

Effective task management ensures that legal teams remain organized and matters progress smoothly from beginning to end. By dividing and automating tasks into manageable steps and allocating clear responsibilities, you remove ambiguity for your team, enabling them to approach projects with certainty.

Utilizing matter-based dashboards centralizes everyday tasks, allowing for the delegation of assignments, setting deadlines on a calendar, and sending updates and reminders efficiently. Implementing a robust task management system helps prevent oversights, deadline misses, and unnecessary delays in projects.

A platform that integrates with email makes it seamless to convert emails to tasks so that legal teams are working from one central dashboard for all critical matter-related items.

## Secure File Sharing

A legal case involves a multitude of documents such as licenses, invoices, contracts, emails, and notes, making organization vital for team efficiency. Integrating a document management system into a secure and centralized location gives legal teams and clients access to critical files without the hassle of searching through numerous locations.

Firms can further reduce email clutter and alleviate version control issues by moving document sharing out of email and into a secure channel. For legal teams that send attachments for review and markup, if multiple people are on the same email thread, document drafts can quickly

become outdated. Working through a secure channel for file sharing gives legal teams and clients the confidence that only the most up-to-date document is being reviewed.

## Compliance

Most collaboration tools are not designed with a law firm's privacy and compliance needs in mind (including ways to apply a defensible legal hold over data) and offer little or no flexibility regarding data retention and deletion configurations.

To help ensure compliance, some firms integrate third-party apps that provide greater customization beyond their collaboration platforms. However, these add-on apps may create unnecessary complications and increase costs for the IT team and business.

A better option is to consider a collaboration platform with customizable data governance features built in that can apply to matter channels. Administrators

can customize when certain information is deleted and have extensive monitoring capabilities.

## Reporting

Data reporting involves structuring data into concise information summaries. For instance, lengthy matter data can be transformed into productivity reports. These reports allow for the extraction of valuable insights, such as monthly litigation expenditures per practice area. The wealth of data within legal matters, including task tracking, case volume, and budgets, provides essential information for future decision-making, highlighting trends and predicting matter outcomes.

Enhanced reporting enables a deeper understanding of resource allocation, team efficiency, and comprehensive insights into risks, compliance, and matter progression.

Utilizing data insights showing an increase in time spent on a specific matter type over the past



year can inform budget allocation adjustments for the upcoming year. Data analysis can also guide decisions on whether to retain all legal processes internally or engage external counsel for certain tasks. Ultimately, continuous data collection throughout each matter's life cycle empowers real-time decision-making for optimal outcomes.

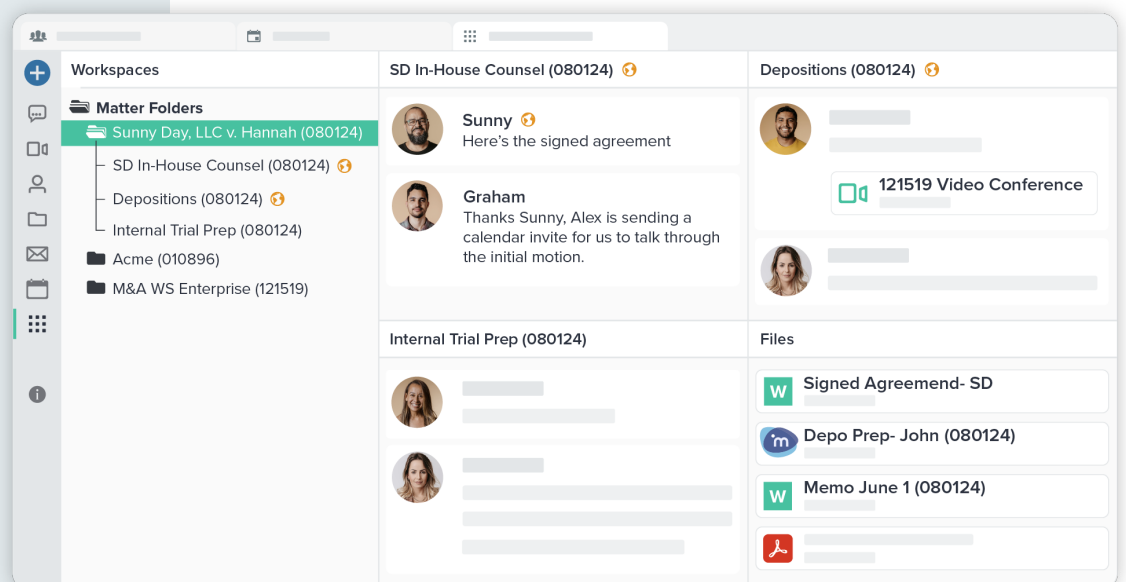
### Communication and Collaboration

Collaborative legal communication entails proactive engagement among parties to exchange information and progress matters through its life cycles. Given the numerous parties involved, effective communication and collaboration are essential for maintaining alignment and trust within the legal team.

Effective matter management requires consistent collaboration, which may entail coordinating tasks, securely sharing documents, conducting virtual meetings or depositions, and utilizing email and internal messaging systems for coordination. Consolidating information from multiple sources can be challenging, particularly when information is subject to frequent updates. The platform must be inclusive for all parties, meaning it must be secure and easy for clients, expert witnesses, consultants, opposing counsel, or in house counsel to join the conversation and collaborate.

Establishing standardized communication channels and leveraging a centralized communication platform allow for seamless real-time updates to be shared with all relevant parties. Best practices for communication may involve early and frequent updates, setting clear response time expectations, and minimizing unnecessary meetings.

Transparency among legal teams and clients ensures alignment and informed decision-making, preventing ambiguity regarding the next steps in a matter's life cycle.



# BENEFITS

Implementing efficient matter management entails establishing standardized procedures and workflows to maintain the accuracy and timeliness of legal matters throughout their lifecycle. A systematic approach to matter management greatly enhances the efficiency of the legal team, allowing attorneys to focus on high-value tasks rather than spending valuable time searching for scattered information.

Beyond just optimizing daily operations, matter management transforms productivity for the entire firm.

## Improved Information Governance

Firms face challenges stemming from internal compliance requirements, data retention policies, privacy concerns, and the complexities of managing data across various locations. A strategic approach is needed: the adoption of a platform that not only provides secure collaboration but also supports matter management.

Workstorm provides a structured approach to organizing and categorizing channel data, facilitating appropriate access and retrieval while maintaining data integrity and security. Firm administrators can regulate access to confidential and privileged information by creating a privacy layer between a firm's information governance administrators and the protected communication between lawyers and their clients. Finally, firms can set custom compliance policies on managed workflows, ultimately improving workflow, automation, and matter management.

## Increased Efficiency and Productivity

Utilizing matter management software provides the ability to create template and custom dashboards that streamline routine tasks and enhance productivity. Toggle tax is an underlying drain on resources. Forcing legal teams to manage different technologies for different purposes inhibits time tracking, billing, and focus.

Bringing together full lifecycle matter management and collaboration into Workstorm means that legal teams spend less time looking for information and more time focusing on client outcomes. Workstorm allows legal teams to set up automated tasks and alerts for important milestones, such as sending invoices, assigning tasks, or tracking status updates.

Further, Workstorm promotes real-time collaboration by providing messaging, video conferencing, email, and calendar functionalities in one single integrated platform. This integrated approach enables legal teams to make quick decisions, solve problems effectively, and enhance communication and workflow efficiency for all parties involved in a matter.

## Strong Client Satisfaction

Clients expect their information to be confidential and shared with discretion: it is essential that law firms prioritize secure collaboration while ensuring accessibility for their clients. Secure collaboration platforms should prioritize data privacy and accessibility to meet client expectations, create trust, and deliver exceptional legal services that prioritize the needs and preferences of the clients.



Workstorm offers a solution for clients: secure, seamless access to matter channels. As a member of a secure matter channel, clients can easily access their legal documents, case updates, and relevant information pertaining to their matters. Clients can send secure short form messaging or start video conferences from within their matter channel. As a result, clients are informed and involved in decision-making, leading to greater satisfaction and trust in the legal services provided.

### Secure Workflow

The key to controlling privacy, streamlining document sharing, facilitating real-time collaboration, and improving communication with clients and external parties is a secure, central platform. This approach not only increases productivity and transparency in legal operations but also strengthens client relationships.

Law firms manage highly sensitive and confidential information for their clients. Not surprisingly, hackers continue to attack the legal sector. A 2024 survey, by Arctic Wolf and Above the Law, showed that 56% of respondents, who had reported their firm had a security breach, lost confidential client data. Email is an often-targeted channel because bad actors know this is a common way for attorneys and clients to communicate confidential information. Additionally, law firms also face silent subpoenas, where business application providers are forced to quietly turn over files, emails, and any other law firm data existing on their servers.

Workstorm helps limit data access through secure hosting options, ensures greater compliance with a firm's data governance practices, and deploys managed workflows to centralize internal and external collaboration. The platform helps move email communication into secure channels to help reduce phishing and other nefarious attempts to gain confidential information. As a result, these proactive measures mitigate risks, uphold stringent data security standards, and foster a culture of compliance within a protected and collaborative environment.

## The Key to Success: Strategic, Inclusive Matter Management Solutions

Enhancing legal matter management positively impacts all facets of legal operations. Being informed about ongoing matters enables critical decision-making, fosters transparency across teams, streamlines workflows, and reduces costly errors. These benefits accumulate over time, leading to a more effective team.

If the future of law firm productivity hinges on a holistic approach to matter management, firms should consider adopting a modern solution. Efficient matter management software simplifies, automates, and coordinates various tasks involved in managing matters from start to finish. Workstorm's matter management solution empowers legal operations to drive increased business value, save time, optimize productivity, and streamline workflow automation. As a result, law firms experience a more productive legal team, and clients experience the satisfaction of case outcomes that align with a firm's strong reputation.

