

## Advantages Of Case Management Platform Shared By Clients

**L**ittler, a global labor and employment firm with dozens of offices and more than 1000 attorneys, has developed its own proprietary case management system, called CaseSmart. The firm's far-flung practice and large caseload makes efficient, predictable and consistent delivery of services a challenge, and the way the firm has combined information management and case management to address that challenge may be a forerunner of how legal services are delivered in the future.

more and more from clients who were tasked with lowering legal costs. We wanted to respond, but we were wary of getting into a race to the bottom. As a result we formed a multi-disciplinary committee to address the issues of lowering costs while maintaining quality, and passing the savings on at a level of profitability that made sense for us."

CaseSmart came out of that discussion. An important aspect of the system is the technological integration of flex-time attorneys, many of them senior

to use the information for planning, staffing and business strategy, as well as for dealing with that issue. Trends and metrics are available to them, although each client's information is firewalled from all other client matters.

Because of its size and caseload, Littler had developed a voluminous database on labor and employment law before CaseSmart was developed. The system allowed the firm to gather data more efficiently, put quality assurance measures in place to assure its accuracy, and use it more effectively across regions and venues.

"We've always had the ability to capture information," says Forman. "The quality control we have now helps us manage ourselves better internally at the same time it brings value to the clients. It lets us explain information to them. For example, we can tell them, in a sanitized way, how their own numbers compare to those of their competitors."

One consideration with a database like CaseSmart's is the potential for discovery. A protocol is in place to make sure the data is harvested in the context of a service provided to a client. The term Littler uses is "attorney-client privileged analytics."

According to Forman, the system's value is best demonstrated by a situation a client found itself in when it instituted a workplace policy that led to administrative charges in several places around the country.

"We looked at the dashboard and noticed right away that the policy was implicated in these charges," he says. "We notified our client of the potential for a systemic investigation by the EEOC if we didn't get ahead of that. So we were able to address that risk proactively." ■

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A major portion of the firm's caseload consists of defending clients against employee complaints, called "administrative charges," that are filed with agencies such as the EEOC and its state counterparts. CaseSmart was developed in order to efficiently manage the life cycle of these cases. It tracks case status, allows managers to identify regions or industries that are prone to repeated complaints, and generates reports that compare performance by results, costs, and other metrics. It also includes a dashboard for clients.

CaseSmart was designed in 2010, but the idea of a case management platform goes back farther than that, according to Scott Forman, Office Managing Shareholder at Littler, who led the effort to develop CaseSmart.

"The legal landscape changed in 2009," says Forman. "We were hearing

practitioners whose life circumstances had changed while they were engaged in the practice of law.

"There were talented attorneys we'd been losing, either because they had young children or were getting older and didn't want the full rigors of working at the firm," Forman explains. "Now they can work in a home office environment that we provide, connected through CaseSmart."

Clients log in to the system in much the same way that one logs into a bank account. They have real-time access to the work product on their matter, plus an overview of trends and metrics that relate to that legal problem more generally. That enables the in-house personnel to look at the situation from a perspective more like a law firm's portfolio as opposed to a single issue for an individual company, enabling them