

# Merging Three into One

Choosing a calendaring and docketing system took careful evaluation.

By *Chris Gierymski*

In 2005, three law firms undertook an unprecedented trans-atlantic merger to create DLA Piper. The juncture of Dibb Lupton Alsop; Piper Rudnick; and Gray Cary Ware & Freidenrich created a global legal services practice with 3,500 lawyers and 3,400 support staff, who operate in 67 offices in Asia, Europe, the Middle East, and the United States.

The size and scope of the merger created management challenges, including the need to unify our docketing processes across all U.S. offices. Pre-merger, the two U.S. firms used different procedures and software.

Gray Cary used CompuLaw Vision. Piper Rudnick used a hybrid of MA3000 from ALM (the publisher of *Law Technology News*), DM2000 from the Law Bulletin Publishing Co., and Microsoft Access.

Given the potential risks we faced with a complicated calendaring system, a unified approach was a high priority. In 2005, we formed a docketing committee. Chaired by senior IT project manager Mark Holdread, it included docketing specialists Jeffrey Chien and Beverly Hueckel; docketing managers Chris Gierymski and Marcus Griffin; IT experts Penny Huber and Becki Kuntze; and records managers Kirsten Hunt, Troy Stork and Kevin Elmore. Committee oversight was the responsibility of two litigation partners, Browning Mearan (a member of *LTN's* Editorial Advisory Board) and Sonya Naar.

The committee spent almost a year evaluating the processes in place and exploring options. We reached out to all U.S. offices and practice groups, so we could understand the different approaches. We



also talked to five other large firms about the technology they used and how they staffed their docketing departments.

## MUST-HAVE FEATURES

Following surveys, interviews, research projects and analysis, we developed a proposal that listed must-have features:

- *Rules-based program:* At the top of our requirements was a rules-based program that could perform automatic date calculations. With so many attorneys in so many jurisdictions, we became convinced that a rules-based system would help protect our clients, save time and money, and help us avoid the logistical nightmare of calculating every court date manually and factoring in all federal, state and local court holidays.

- *Scalability:* The ability to grow as the firm expanded was a critical issue.

- *Customization:* We wanted to be able to customize the system, so independent

offices could retain some of their best calendaring practices.

- *Centralization:* We needed a centralized database that could be accessed by all of our U.S. offices, so that updates to the calendar would be in real time. Looking forward, we wanted a system that would allow both support staff and attorneys to view calendars, but with different security controls and authorization levels.

- *Costs:* Of course, we were concerned about costs, but we decided that the benefits would far outweigh upfront costs.

Once we narrowed down our priority list, we considered two rules-based products, Thomson Reuters' ProLaw, and CompuLaw Vision, and ultimately chose the latter. In part, the decision was based on recommendations from our Gray Cary attorneys who were already using the program.

In addition, ProLaw was marketing its calendar program more toward small to mid-sized law firms.

We were also impressed with the intuitive nature of the software; our ability to customize it using the extensive set of rules already built in; the willingness of CompuLaw to make revisions to the software based upon our needs and demands; and that it integrated with existing software (Microsoft Outlook, Elite, and Autonomy's Interwoven line).

We did consider other products, including MA3000 and DM2000, but they were not rules-based programs and their products mostly supported local legal markets, New York and Chicago, respectively.

We extended our Gray Cary license agreement to cover all 26 U.S. offices of DLA Piper.

## OBJECTIVES & GOALS

The installation process, which lasted about 12 months, started in 2006, and was defined by objectives and goals. Project manager Mark Holdread monitored every step to assure tasks were completed in a timely manner. We also enlisted the assistance of CompuLaw's technical support staff, lead by Rick Rains, vice president of software development.

We began with two days of classroom training, with CompuLaw trainers using our facilities.

Next we converted several large databases from the legacy firms and offices, starting with the larger offices, such as New York and Chicago, and moving to smaller offices thereafter. CompuLaw provided technical support with installation and setup.

We decided to install and use CompuLaw Vision on a Citrix server to gain the benefits of a virtual environment, such as minimal disruptions due to software upgrades. Once CompuLaw Vision was installed, tested, and functional, we rolled out docketing support to every office.

The West Coast offices were already familiar with the CompuLaw product and did not need any formal instruction other than a slight change in workflow process. Otherwise, docketing support was rolled out by office, averaging about 30 to 45 days per office.

We used project management principles to create timelines. Each rollout usually started with a telephone meeting between myself and the head litigation attorney so that he or she knew the expectations and would be supportive. Next, if there was an existing database, it was converted into CompuLaw Vision. Then a communication was sent to all personnel, followed by a meeting where I would sell them on the support our department was ready to provide.

Like any smooth rollout, there were some glitches and roadblocks. Some of the tables converted from legacy databases had minor errors concerning certain fields, but they were not critical to the existing deadlines and most were corrected manually as the docketing specialists reviewed the records.

Some roadblocks included resistance to the workflow process or special group needs that were not identified during the research phase of the committee's work. Nonewereddealbreakers, and they wererem-

## COSTS

*Editor's note:* DLA Piper declined to provide cost information, which is required for IT@ articles. Therefore, CompuLaw provided this information:

For a large law firm of this size, CompuLaw Vision would cost approximately:

One Time Initial Costs (3,500 attorneys and 3,400 support staff):

- Timekeeper licenses: up to \$300,000.
- Web portal: up to \$65,000.
- CompuLaw web part for SharePoint: up to \$48,000.
- Autonomy (née Interwoven) integration: up to \$48,000.

Annual Renewal Costs:

- Court rules: up to \$85,000.
- Service and support for software and court rules: up to \$48,000.
- Training: custom quote based on firm's needs.

edied quickly through simple cooperation and adjustments.

As we adopted the calendaring program, we also centralized our docketing department under the administration of our CIO, Don Jaycox. In January 2007, I was named director of docketing, reporting to Michael Barnes, senior director of business services. We currently have 10 specialists: three on the West Coast, three Midwest, and four on the East Coast.

### THE DOCKETING PROCESS

Because our firm is committed to a global sustainability program, reducing paper waste is a green priority. Toward that goal, we implemented an electronic docketing workflow process. Here are some facets of the operation:

- Requests to calculate deadlines and calendar events are sent by e-mail, calendar reports are distributed as PDF attachments to emails, and schedules and backup documents are stored electronically.

- We have created docketing distribution lists and inboxes for each region, and every request for a calendaring item is sent to the appropriate address.

- Attorneys who participate in electronic filing with the courts are encouraged to add their regional docketing e-

mail address to their e-filing accounts for

- We use Microsoft Outlook; the docketing department shares the e-mail inbox accounts much like a bulletin board. The oldest or most urgent requests appear first on the list and get processed accordingly. That system also allows for continuous docketing support when staff members are away from the office.

- We have created a template request form that attorneys and support staff must complete and e-mail, along with any supporting documents, before the docketing department can calculate a court date. Once we receive the form and supporting documents, we extract the information we need, calendar it, and create a schedule in Vision with all due dates based on specific trigger dates and jurisdictional rules.

Then, we send the relevant information to all people associated with that case. We often encourage our personnel to synchronize Vision with their Microsoft Outlook calendar, so court dates are automatically entered into their calendars and BlackBerry devices.

### COACHING

A major aspect of my job has been encouraging attorneys and support staff to view the docketing department and CompuLaw Vision as tools that help them do their jobs more thoroughly and efficiently. In the last two years, I've visited many of our U.S. offices to explain the technology and the benefits it offers. We did not want our personnel to feel that this change was unilaterally forced upon them; we want them to have a sense of ownership in the process.

In 2008, we rolled out the CompuLaw Vision Web Portal, so everyone can view their court calendars online. We expose our new attorneys to the docketing process early, to encourage use from the outset of their careers. Simply put, we promote the docketing department at every opportunity. Even the best court calendar will not help if it's not embraced by everyone at the firm. **LTN**

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