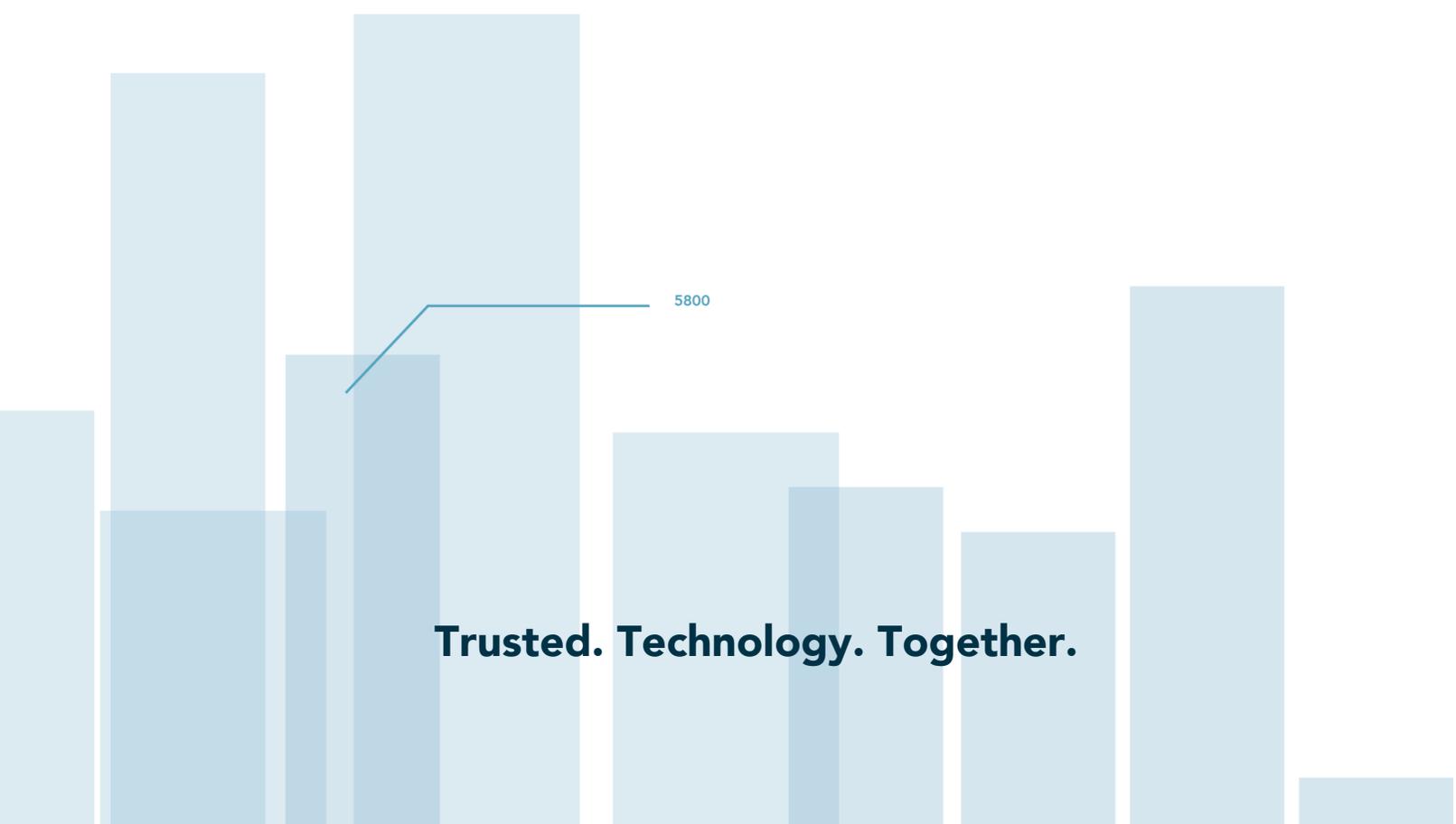




**Briggs and Morgan:  
A case study to explain how a close four-year  
working relationship increased law firm value and  
accountability**

---



**Trusted. Technology. Together.**



# Background

Briggs and Morgan has remained one of the Midwest's most trusted names in business law and litigation services over its 135-year history. The firm's 150 attorneys represent regional, national, and international clients in virtually every industry segment, managing approximately 50–100 litigation, transactional, and regulatory matters every year. Throughout its history, Briggs has followed a practice philosophy that emphasizes concrete, practical legal solutions for its clients.

In recent years, the firm has undertaken targeted initiatives aimed at client service and brand recognition. They have carefully researched and deployed new technologies all intended on enhancing the client experience.

## A STEPWISE, DELIBERATE TRANSITION

As part of that broad effort, four years ago, the firm transitioned its eDiscovery technology from a mix of Summation and CaseMap to Casepoint, a cloud-based platform designed for seamless and comprehensive eDiscovery across the phases of the Electronic Discovery Reference Model (EDRM). Casepoint was selected after an extensive evaluation of several competing platforms. Once Casepoint was engaged as the firm's primary eDiscovery technology provider, closed cases were archived in Summation, and data from live and new matters was moved to Casepoint. At any given time, the firm may be working on 30 different active matters.

Working closely together, Briggs and Casepoint developed a long-term strategy for implementation. The first six months were focused on the transition, and data migration was completed in a year. To ease the transition, Casepoint conducted several onsite training sessions, educated the firm's employees on the many benefits of switching platforms, and provided valuable hands-on assistance to lawyers, litigation support teams, and paralegals in making the most of the new technology.

Much of that initial period was focused on establishing buy-in across the firm and educating employees about the benefits of the technology from multiple perspectives – including IT, cost,

workflow, and efficiency. Gradually, with collaborative assistance from the Casepoint support team, the transition enabled new synergies that are now helping Briggs provide value and consistency of experience for its clients. Approximately 100 of the firm's attorneys currently use the Casepoint platform on active matters.

## THE UNEXPECTED BENEFITS OF A CLOSE PARTNERSHIP

Since the initial migration, Briggs has renewed its services agreement with Casepoint every year. But the story of this unique engagement does not end here. While James Keuning, the firm's Director of Practice Support, consistently endorses Casepoint for its utility as a powerful and easy-to-use platform for managing electronic evidence, he is more interested in talking about the collaborative partnership between the two organizations.

"The Casepoint team has become an extension of the firm," he notes, "influencing learning through regular training sessions. Our workflow has evolved with the introduction of their platform's capabilities," says Keuning. Keuning also points out that regular feedback from Briggs has influenced ongoing enhancements to Casepoint technology. "Based on our input, they've made a number of subtle changes to their search function to make it work better. They've also improved the



way the software organizes documents and tags, making it much more convenient and efficient for users. This kind of thing makes a big difference to us.”

A key takeaway from the partnership between Briggs and Casepoint is the importance of working together to add value to the client experience. The collaborative mindset embraced by both organizations reflects the management style of Ann Rainhart, Briggs’ COO, who joined the firm when the transition to Casepoint was just getting underway. Rainhart has overseen many of the firm’s recent branding and modernization initiatives. Rainhart’s leadership was instrumental in achieving the cohesion among departments that proved essential to the success of the partnership with Casepoint.

## CASEPOINT HELPS BRIGGS PROVIDE MORE GRANULAR INVOICING

Invoicing is another area in which Casepoint has worked closely with Briggs to come up with a customized solution. Briggs typically bills clients for eDiscovery using a flat fee model. But instead of simply invoicing for the agreed-upon amount, it’s important to the firm that the client understands the totality of their data footprint. To meet that requirement, vendor and firm collaborated to develop a reporting format that incorporates detailed information about data volumes, types, usage, and other details from the Casepoint platform, and integrates with Briggs’ project management information system. Invoices are generated automatically, and clients get a granular view of the value the firm provides.

## ADDITIONAL BENEFITS OF THE SWITCH TO CASEPOINT

### ● **Speed & 24/7 service:**

“It’s not unusual that we need to get data out of our database and give it to an opposing party, with very little notice,” says Keuning, “and we might be here late getting the production prepared. It’s nice to know that we can hand it off to the Casepoint team

and our people can go home. Casepoint can perform the work around the clock; we know the production will be accurate and we can have it at work the next day. Their people are extremely fast and accurate.”

### ● **Accuracy:**

“This is not something we take for granted. Casepoint doesn’t make assumptions. Their calculations and data volume estimates are always accurate. Also, over the years we’ve had a number of special requests – like exporting certain documents from the database – and the Casepoint team is always responsive. When our paralegals ask for something, they get exactly what they need.”

### ● **Pain-free project initiation:**

Initiating new projects with Casepoint is seamless, requiring little paperwork and/or back and forth. Generally, the database is up and running the same day. “This is not something that is universal,” Keuning points out. “With other vendors, there’s typically a four-page intake form to fill out, and that’s time-consuming.”

Keuning has worked with a number of eDiscovery platforms, including Ipro Eclipse, Summation, Xera iCONNECT, Relativity, CS Disco, and Everlaw. Casepoint is unique in his experience because of its razor focus on service and ongoing enhancements to its product. “Casepoint’s software is intuitive, but I think it’s fair to say most top-tier software is intuitive. Casepoint stands out by doing a superior job of keeping it intuitive and is always making improvements.”

## ABOUT CASEPOINT

Casepoint empowers legal departments, law firms, and public agencies by providing smarter legal technology combined with award-winning client service. Casepoint eDiscovery is the fast, enterprise class, and next generation eDiscovery suite from Casepoint, based on more than 10 years of innovation in the industry. It is built upon Casepoint Platform, a highly scalable, secure, and configurable application environment that meets the demands of sophisticated clients within



eDiscovery and beyond. Whether SaaS, on-prem, or hybrid, Casepoint eDiscovery features cloud collections, data processing, advanced analytics, artificial intelligence, review, and productions -- all in an easy-to-use web interface. Casepoint customers benefit from the ability to support sophisticated workflows across millions of documents and hundreds of users, with custom reporting and data management tools built-in. Simple, elegant, and intuitive, Casepoint represents the next generation of litigation technology that will empower global legal teams.

