

WEST CASE NOTEBOOK SKJOLD • BARTHEL

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IN HANDLING CASES, CLIENTS

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“Nimble” describes Skjold ■ Barthel, P.A. The 12-person firm handles transaction and litigation work across a variety of client and case sizes. Because any client may have large matters and large clients may have smaller files, scalability is essential. The firm prides itself in its ability to adapt to the unique needs of each client and each case.

“From the ground up, this firm was built around technology,” says Ben Skjold, partner. “We wanted a firm that could adapt to our clients’ needs – whether large or small, whether their cases were simple or complex. We rely on state-of-the-art technologies like cloud computing to appropriately scale our computing capacity instantly to meet our needs without the burdens of large capital expenditures.”

Effective, efficient and flexible case management is what the firm calls its “scalable litigation model” and Case Notebook is a key component of that model. Case Notebook provides a collaborative workspace where the litigation team can better organize and analyze case information. The fact that it is sold on subscription, which includes free upgrades to new versions, is appealing to lawyers that believe a firm should not be in the business of investing its capital on assets that can quickly become obsolete.

LEVERAGE FIRM TALENT

Each attorney at Skjold ■ Barthel has their own unique area of emphasis, ranging from litigation, securities regulation, finance and M&A to shareholder agreements, franchising and tax-related matters. For a firm focused solely on the needs of business, the ability to work collaboratively and apply that expertise when and where it is needed for client work is essential. Skjold went on to say:

“Case Notebook allows us to capture the collaborative energy in the firm. It helps us fully utilize the expertise of all our lawyers. And that delivers more effective work and better value to our clients.”

Case Notebook promotes collaboration because it provides the ability to easily permit each attorney’s area of emphasis to be captured and utilized by sharing documents, ideas, comments and analysis with all team members. Take a banking dispute, for example. Now, the transactional attorney most experienced working with bank documents can easily provide review and analysis to the firm’s litigation chair, Chris Parrington. This saves the client money, creates a better work product, and permits a better utilization of attorneys across each of the practice areas. The program organizes essential case documents in one place – attorneys can enter and share key facts, documents, main characters, evidence, pleadings, legal research and more. Skjold explains:

“The law is becoming so complex that it’s very difficult for any one attorney to know everything, such as litigation rules as well as the complexities of securities law or franchise law. Case Notebook lets us utilize the knowledge and background of every attorney in the firm and then synthesize that analysis with the facts of the case in an efficient manner.”

Collaboration does not mean double billing, rather it promotes effective strategic planning. Gathering different input from multiple areas of expertise can be invaluable in developing a sound, comprehensive approach to a case. Says Tony Barthel, partner:

“By having different lawyers provide their perspective on a case, and having their comments all in one place in Case Notebook, the attorney in charge of the case can digest all of those different viewpoints and formulate a game plan that’s more complete.”

"Prior to Case Notebook, it was difficult to do that in a seamless and efficient manner," Skjold notes. "Now we can capture all of that analysis in a meaningful and usable manner."

HANDLE COMPLEX CASES

Many areas of business law, such as securities law, are becoming more complicated every day. It's not surprising then, that Barthel says the complexity of cases is rising as well: *"Even the smaller deals are becoming more complicated, involving more and more documents. That's one of the biggest changes we've been seeing in our practice recently."*

Skjold ■ Barthel uses Case Notebook to help organize case documents. The organizing begins when legal assistants and paralegals load documents into Case Notebook. As they do so, documents are coded by issue and organized into folders. As paralegal Teri Inderieden explains, that speeds up searching for information within a case:

"As I send files into Case Notebook, I'm highlighting text that is important to a particular issue and coding the documents. When attorneys want a particular document or text section, I can search by keyword or issue code and find it in seconds instead of spending the entire day looking through dozens of binders or boxes."

For the attorneys, this means that instead of wading through endless piles of documents, they can focus in on the documents that are at the heart of a particular matter. As Barthel puts it:

"We can identify a specific set of information that's most useful, and not spend energy on parts of the case that won't yield results."

When litigation teams gather to map out an initial approach to a case, one of the first things frequently done is to consider how to use Case Notebook. According to Parrington:

"We tailor Case Notebook to how we want to best use it on each case. Every time we start a new project, we think about how we can use all the tools it has to best organize and analyze the documents. We can code files for multiple issues and different uses."

Case Notebook can save considerable time and effort even after the conclusion of the initial case. For example, M&A deals and securities offerings often are not closed on the first attempt. With all of the notes, research and analysis still attached to the original documents, a case can easily be reopened and revisited, whether to make changes or to be used as the basis for structuring a different deal.

INTEGRATE RESEARCH FROM WESTLAW NEXT

Case Notebook now integrates with WestlawNext™, the next-generation legal research service. Legal research can be seamlessly integrated into Case Notebook case files where users can easily make connections between the law and the evidence. Skjold states:

"The ability to take cases directly from WestlawNext and place them directly into Case Notebook allows even tighter collaboration and less redundancy. We can more effectively utilize each of our lawyers and their focus on a particular area of law."

"By bringing the research into Case Notebook, we can add analysis that's crucial to making informed decisions. I can have another attorney review the document and my notes to see if the analysis is appropriate. I don't have to add the legal research because it's already there. Case Notebook does that in a very seamless, efficient manner."

BETTER WORK, BETTER VALUE FOR CLIENTS

Today's law firms need flexibility in handling cases of varying size and complexity in order to leverage its collective expertise and knowledge to help deliver better value to its clients. As Skjold explains it:

"Case Notebook takes all of our work on case-related documents and puts it into one spot, allowing us to work together. It makes us more efficient in how we manage our cases. Case Notebook lets us apply the right lawyers on the right cases at the right time. That helps us produce better work product and reduce costs, creating a better value proposition for our clients."



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