LITIFY

The 5 Benefits of Litify Enterprise Legal Management (ELM)

...Over Legacy Case Management Systems

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INTRODUCTION

This white paper presents five reasons why Litify Enterprise Legal Management (ELM) is a better long-term choice for organizations vs. traditional – or "legacy" legal case and matter management systems.

The Litify ELM team has been in the legal case management space for more than 20 years. During this time, the team has worked on a variety of implementations, from Fortune 100 companies to some of the largest government agencies in the country. Litify ELM, built on Salesforce, embodies all the best practices we've learned from those implementations on a platform that isn't limited by legacy code, frameworks, or databases.

While the shift to running on a widely-used platform alone is a significant improvement over legacy systems, this document highlights points that are less subjective, but which are equally critical and lead to measurable benefits for every customer.

In summary, we believe the top five reasons to choose Litify ELM include:

The 5 Benefits of Litify Enterprise Legal Management (ELM)

Reduced Risk:

With the Litify team and 1.4M Salesforce admins worldwide, you're never on your own, and the risk associated with the system is minimized. Customers will be able to use Litify ELM for the indefinite future.

Lower Total Cost of Ownership:

The design of the Litify ELM together with the nearly limitless resources available for training and support significantly reduces the overall cost of the system.

External Portals:

The Litify ELM platform allows for nearly any screen or functionality to be exposed to the public and/or other users outside the legal department. This significantly reduces the costs of deployment for an external-facing portal, provides accountability, and provides a better experience for external users.

Better Flexibility and Configuration:

Because Litify ELM is built on Salesforce, the system is able to leverage the additional administration tools embedded in the platform, can be integrated with 3,400 other systems, and can be configured without code for nearly any legal setting. Litify ELM provides customers with a suite of tools that are significantly better than what is available in legacy systems.

Innovation:

Between Litify and Salesforce Engineering teams, there are continuous innovations of the Litify ELM platform – including 8+ significant product updates per year – providing an infinitely improved user experience over traditional case management systems.

▶ *Read on for more details.*

1. Reduced Risk

The combination of the long-term sustainability of Salesforce together with the resources available for support and its extensibility makes Litify ELM a better overall investment of customer resources versus a similar investment in traditional case management systems.

Stability

Salesforce is a $174B company with 2021 sales of over $26B and 73,000 employees.[1] The product groups at most legacy case management providers typically consist of less than 1,000 employees, which as evidenced by recent history, is subject to be purchased outright or be involved with new acquisitions that may negatively impact customers.[2] Litify ELM insulates customers from this volatility. Since Litify ELM is built on the Salesforce platform, customers can access any of the 1.4 million Salesforce administrators worldwide to, if necessary, update, augment, or create new functionality within the system. As a result, the investment risk associated with Litify ELM is far lower than an investment in a legal technology vendor built on a proprietary platform.

Resources

For most legacy case management vendors there are very few people, often less than 10, who can fully develop and troubleshoot the system. Similarly, finding answers to questions about legacy systems online can be challenging, if not impossible. In contrast, there are thousands of developers fluent in Salesforce and thousands of resources available online.

Extensibility

The additional developer tools in Salesforce can be leveraged to extend Litify ELM to meet unique and varying customer needs. However, the possibilities for extensibility increase exponentially through applications available on the Salesforce AppExchange. The AppExchange currently offers over 3,400 applications that extend the platform's functionality, many of which are free. Sample "apps" that may be useful to customers include applications that enable electronic signatures and dashboards that track user adoption.

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[1]*Salesforce* overview, see this link.
[2]See, for example, http://www.mitratech.com/resource-hub/pressreleases/mitratech-announces-strategic-investment-by-ta-associates-to-accelerate-growth/ (TA Associates purchases Mitratech, 2015) and https://www.law360.com/articles/282010/vista-snaps-up-legal-software-co-mitratech (Vista purchases Mitratech, 2011).

2. Lower Total Cost of Ownership

Based on our experience implementing both traditional case management systems and Litify, we have found the costs for implementation, training, and ongoing support for Litify ELM is considerably less than traditional case management systems.

Stability

Salesforce upgrades are rolled out three times per year. These roll-outs are managed and implemented by Salesforce, which ensures all systems in the Salesforce ecosystem can be upgraded without negative implications. Upgrades to most legacy case management systems require considerable time and costs for testing and deployment. While some vendors offer "no-cost" upgrades, the restrictions on development within these systems to maintain eligibility for such upgrades are usually impracticable.

Resources

Sharing and publishing information to users outside the legal department is embedded within Salesforce and Litify ELM. Building similar functionality within legacy systems is either limited or requires significant development.

Extensibility

Improved usability and free training resources available from Salesforce significantly reduces the time and effort to train end-users, administrators, and developers. In addition, Litify ELM includes a volume of online help and training materials, which can be accessed directly from within the system. Supplementing this, as previously noted, is a vast amount of third-party help articles on nearly anything related to Salesforce. Salesforce also produces a separate interactive training program "Trailhead," a collection of free lessons spanning nearly the entire Salesforce product suite.

3. External Portals

As noted above, Litify ELM includes an option to present nearly any screen or functionality from a system on an externally-facing system. Outside users can be granted access through a combination of security options. Again, most legacy case management systems don't offer a public-facing option.

Improved Access, Collaboration, and Transparency

The myriad of options together with low development costs can significantly enhance how external users interact with legal departments.

The form above is for demonstrative purposes in order to highlight what's possible with Litify ELM. Information entered on the form populates an intake screen within Litify ELM and alerts one or more designated users. After reviewing the information, a user can escalate the "Intake" into a Matter or Investigation record..

This form and accompanying functionality can be completed within several hours and without any code. The concept of a public portal isn't offered by most traditional case management systems – let alone the possibility of such short development turnarounds.

Vendor Billing

External users can submit information traditionally associated with eBilling through the Litify ELM vendor portal. Unlike other systems, the Litify portal is an external-facing version of the internal system. This model eliminates the multi-server systems used by traditional ELM vendors and offers a collection of benefits, such as:

- Organizations can choose to augment data collected with timekeepers, accruals, and budgets to match internal requirements.

- External users can be given access to view their approved timekeepers and rates.

- Internal and external users can collaborate on records, such as matter notes, in real-time and communicate via the instant messaging tool included with Litify.

4. Better Flexibility and Configuration

Litify ELM is designed to fully leverage the workflow, approval, and other administration tools in Salesforce – providing far better flexibility and configuration than other legal management systems. These tools are an amalgam of the most advanced tools available and are superior to similar tools available in any other case management system. We offer highlights of the following subset of the tools available:

Workflow and Approvals

Salesforce offers several tools to create workflow and approval processes, without code. Most Litify systems are deployed using only the configuration tools included with Salesforce and do not require any code. As an example, the widely-used Flow Builder provides users with a graphical representation of a workflow as they create it. The tool walks the user through the process, guiding them from identifying the starting point to selecting items from picklists to identify actions.
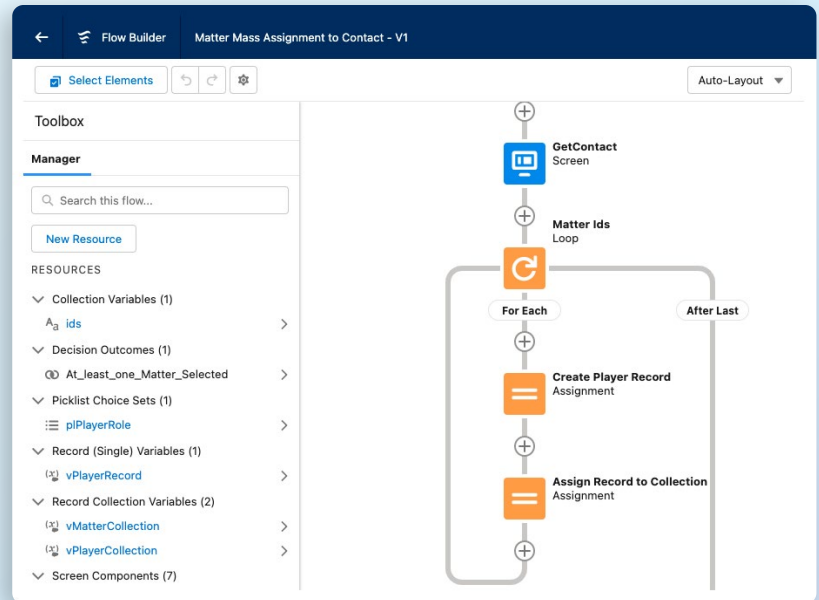
Security

Salesforce includes a suite of tools to manage security. These cover all aspects of the system, from what users can access, to which fields are editable, to the records that are visible. Once established, this security flows through the entire system including all searches, reports, and how data is presented in Outlook, Gmail, and the Salesforce Mobile application.

Name matching/Duplicate Checking

Identifying duplicate records is an essential part of any case management system especially for contact and matter records. Salesforce includes a collection of name matching algorithms, many based on linguistic studies, to identify potential duplicates. These rules are routinely updated to match the latest studies. The logic for matching duplicates in legacy systems required extensive coding and updates to the logic was only available with additional professional services engagements.

[3] An overview of Flow Builder can be reviewed at t.ly/wdJg.
[4] For an overview of the matching algorithms used in Salesforce see, https://goo.gl/MiuSFI.

5. Innovation

Salesforce is widely-recognized as one of the most innovative companies in the world. [5] Much of this innovation is focused on the end user experience. The result is increased user adoption and reduced training.

User Interface

The Salesforce and Litify ELM user interface is the result of years of research and associated effort.[6] The controls, flow, and tools available to users embody the latest technologies and are constantly evolving. The result is a user experience that is far superior to what was available in other systems. In addition, these features are routinely enhanced and augmented when Salesforce and Litify roll out upgrades.

Mobile

Everything in Litify ELM's desktop application has parity to the app version on mobile devices. This means that every aspect of Litify ELM, with any new screens, fields, or business rules are accessible via the Litify ELM mobile app. Litify ELM runs on the Salesforce Mobile app which, like everything else in Salesforce, benefits from multiple updates per year and is perennially compatible with both iOS and Android devices.

Outlook and Gmail Integration

Salesforce offers a variety of integration points with Outlook and Gmail including bi-directional calendar integration, drag and drop emails, and views of Litify ELM from within Outlook and Gmail. While most legacy systems offer some email integration, it is often limited and subject to failure during system upgrades. Since it runs on Salesforce, LitityELM takes advantage of the native integration offered within the Platform, which is updated as needed to maintain interoperability.

Artificial Intelligence (AI)

Artificial Intelligence is becoming increasingly available throughout the Salesforce platform. "Einstein Next Best Action" (NBA) provides users with suggestions, like Amazon, based on information within records, such as a Matter. For example, an NBA might suggest a user add a specific event when a matter reaches a certain stage. Like other tools in Salesforce, this functionality can be configured by System Administrators.. Other AI-inspired tools available include the "Prediction Builder" which guides users to recommended actions based on data in the system and options to embed predictive insights into any record in Litify.

Litify ELM finally enables lawyers and their staff to **benefit from new technology** as it becomes available, instead of shackling them down to the legacy of older systems created decades ago.

Request your free demo today at www.litify.com.

REQUEST DEMO

[5]*Forbes,* https://www.forbes.com/innovative-companies/list/.
[6]See, https://www.lightningdesignsystem.com/guidelines/overview for an overview of the development of the Salesforce Lightning interface.