Project Leadership ASSOCIATES

Lead with Strategy. Leverage Technology. Deliver Results.

LEGAL SOLUTIONS

STRATEGY & EXECUTION

BUSINESS OPERATIONS

APPLICATIONS

INFRASTRUCTURE

Project Leadership Associates focuses on delivering all of our services with industry leading thought-leadership, seasoned senior consultants and strong business understanding.

LEGAL SOLUTIONS

Project Leadership helps law firms and corporate legal departments improve operations by enhancing operational strategy, organization, processes and technology.

Legal Solutions

Improve operations, demand generation, revenue collection, and risk control within your legal office.

Project Leadership helps law firms and corporate legal departments improve operations by enhancing operational strategy, organization, processes and technology. We understand that a lawyer's productivity is closely tied to the ability to manage people and information. That's why all of our Legal Solutions focus on improving operations - so that you can deliver faster, cheaper (where appropriate), better and with more value. Our Legal Solutions also focus on mitigating risk - to help your clients and internal/external stakeholders.

As the largest independent business and technology consultancy serving the legal industry, Project Leadership has worked with more than 300 law firms and corporate legal departments over the past few years. Our experienced team (our team averages more than 17 years of work experience in law firms, corporations and consultancies) combined with our ability to provide highly tailored services allows us to provide focused operations and technology solution. Our clients tell us repeatedly that we have the experience and execution skills to consistently deliver.

Benefits

Law Firm Benefits

• Improve law firm demand generation and revenues as well as matter and department profit margins.

• Improve law firm and departmental operational costs and efficiencies.

• Improve service and value.

• Increase speed.

• Reduce the law firm risk profile.

Corporate Legal Department Benefits

• Improve corporate legal department operations and throughout.

• Lower costs through operations improvement.

• Improve service and value.

• Increase speed.

• Reduce the corporate risk profile.

If you are interested in learning more about Project Leadership's Legal Solutions, please email Dan Safran at dsafran@placorp.com or call 312-876-2787.

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Enterprise Content and Document Management

Improve search and retrieval, speed and efficiency while reducing litigation risk.

Project Leadership can help your organization define an electronic content & document management strategy; map, migrate and manage your documents, electronic mail and all content through a central repository; to provide maximized access and control from creation to destruction. We understand that every business is unique, so we work with you to create a program specifically designed and tailored to your business needs. We help you develop your document management requirements, assist you in selecting the right technology to support those needs to optimize the ease of searching, finding, and accessing documents that you need when you need them. Whether you have an existing solution set and need to make improvements, or you need help to develop a new solution set, Project Leadership offers deep experience to help you leverage an electronic content/document management strategy leveraging new or existing technology.

Sub-services

- **Electronic Content/Document Management Strategy and Planning:** We help you to develop a comprehensive strategy and roadmap that takes into account your enterprise content management needs, records management requirements as well as litigation readiness and preparedness needs to architect the appropriate direction for your organization.
- **Technology Requirements Definition and Solution Selection:** Project Leadership helps you define your internal and external document management requirements to select the software solution that best fits your needs, and performs market analyses to map all of the top document/electronic management systems to help you define and evaluate a superset of solutions that might fit.
- **Electronic Content/Document Management Solution Planning and Implementation:** Project Leadership can implement and customize 3rd party software to help you develop your content map so that you build the right search and retrieval architecture for your organization.
- **Collaboration and Document Sharing Solution Development:** Project Leadership can help you define the right collaborative document management and cooperative publishing system as required by your clients and customers—either on an enterprise, project or matter basis.

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Enterprise Content and Document Management

• **Intranet/Extranet Content Management Development:** Project Leadership can help you select the appropriate solution, or through its deep resource set, can help you custom develop a platform that is open and flexible, yet, positions you to construct barriers to entry/exit for your clients and customers.

Benefits

• Effectively manage documents throughout the entire enterprise, project and matter lifecycle.
• Retain, protect, and restrict access to important documents.
• Ease and speed search and retrieval for your critical content and document assets.
• Improve client service delivery and satisfaction through better document and content reuse.
• Reduce business risk by facilitating more consistent document and enterprise content retention.

If you are interested in learning more about Project Leadership's Enterprise Content/Document Management services, please email Amy Brooks at abrooks@placorp.com or call 312-441-0077.

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Portal Implementation

Enable any internet users to access both static and dynamic content from a central web based portal. Additionally, authorized users can access a secure area of the portal.

Project Leadership can help your organization leverage Microsoft SharePoint 2007 to present a unified web view of information so all authorized users can access and manage both static and dynamic content such as dashboards, KPIs, applications and content through one single location.

Benefits

• Allow authorized users to easily access any information.

• Enable your business to grow in a seamless manner by eliminating unnecessary desktop footprints.

• Present information through a secure and organized portal.

• Re-use an existing application to present information through a centralized location.

• Improve productivity and collaboration throughout your entire organization.

If you are interested in learning more about Project Leadership's Portal Implementation Service, please email Gaurav Issar at gissar@placorp.com or call 312-441-1284.

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Records Management

Reduce risk and timeliness of litigation and related discovery through an optimized Records Management policy and program.

Project Leadership specializes in helping organizations develop practical, enterprise-wide records management strategies and policies to comply with regulatory and industry requirements (e.g., SOX, HIPPA, GLB and New Federal Rules of Civil Disclosure). Our records management program consists of strategy and related records policy, retention schedules, records processes and procedures to support appropriate resources and technology solutions to force compliance which is critical for effective support and control of your client/customer and internal records.

Project Leadership helps you develop your company's records strategy thought our specialized issues based approach—that delivers a targeted, thorough comprehensive, policy and records retention schedule. Project Leadership can assist you to develop your records retention procedures and help define organizational requirements. Project Leadership also focuses in helping you define and select appropriate document and records technology solutions to assist in ease of use and compliance of the agreed policy. Your company needs to understand how records are identified, classified, archived, preserved, and destroyed. Project Leadership helps you develop a practical approach—as well as determine your company's readiness.

Sub-services

• **Current State Assessment:** Project Leadership conducts a series of information gathering sessions to understand your current state records management environment and practices; identify gaps; and establish a framework for the future state records management environment.

• **Physical Records Baseline Inventory and Compression Model:** Project Leadership develops a baseline profile of the current state physical records environment and a flexible compression projection model.

• **Records Management Program Strategy (Multi-Year Plan and Scope):** Project Leadership works with you to develop a detailed strategy, program roadmap and implementation plan that reflects desired records management goals, with key records projects prioritized over a multi-year schedule.

• **Records Policy and Retention Schedules:** Project Leadership develops comprehensive records management policies and records retention schedules, using an experience-based issues approach, to ensure the consistent management and governance of records and information throughout the information management lifecycle.

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Records Management

- **Records Organization Alignment:** Project Leadership designs and implements records management organization structures aligned to support your firm's/company's strategic and operational records management needs with responsibility for both physical and electronic records.
- **Operational Framework and Procedures:** Project Leadership works with you to develop an operational framework with which all records staff work and perform records management tasks. All core procedures are identified and developed, aligning with the capabilities of the records policy and records and document management technologies.
- **Records Management Technology and Applications System Selection, Planning and Implementation:** Project Leadership leverages its deep knowledge and experience with document, physical and electronic records management tools to help you define requirements, select and implement the appropriate document and records management systems and solution sets for your organization.
- **RM Policy/Program Implementation Readiness:** Project Leadership assists in developing the optimal records policy rollout scenario based on your company's maturity model, culture and timing. Project Leadership expertise can greatly assist in records management marketing, training and support programs that are critical to a successful introduction of a new records management policy, initiative or overall program.

Benefits

- Improve access and control of both physical and electronic records.
- Improve adherence to regulatory requirements.
- Minimize risks and improve litigation and discovery cost avoidance.
- Improve the speed of discovery and reduce costs.
- Reduce physical and electronic records storage and retention costs.

If you are interested in learning more about Project Leadership's Records Management services, please email Amy Brooks at abrooks@placorp.com or call 312-441-0077.

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Knowledge Management

Improve intellectual capital, client service, productivity and speed of delivery through effective access and reuse of institutional knowledge and expertise.

Project Leadership can help your organization develop and execute its strategy to capture, search and reuse intellectual capital. Whether it is client intellectual property, internal market research, specialist information or client work output and deliverables, we can help you improve efficiencies, increase the speed of delivery and provide superior value to your clients.

Structuring, storing, searching, finding and reusing intellectual assets is key to managing internal knowledge such as client work, research, benchmarks, brand information, methodologies, news, plans, work papers, analysis and other intelligence. Project Leadership's expertise in knowledge management, business and technology planning and execution services can help you achieve this strategic goal.

Sub-services

• **Strategy:** We will work with organizations to understand their existing knowledge management strategy, people, processes and technology. We identify business and knowledge management goals, and then assist in developing priorities and a knowledge management roadmap.

• **Assessment and Recommendations:** We evaluate the organization's requirements, current state and identify what gaps need to be filled to achieve their knowledge management goals. We advise our clients on strategy, structure, processes, organization and technology direction and provide recommendations and propose an execution plan to get to the finish line.

• **Technology Requirements Definition, Solution Selection and Implementation:** We leverage our deep technology heritage to identify requirements and specific technology solutions to meet your organization's needs. We can help you implement and integrate this technology to take advantage of diverse content repositories, including email. Our technology solutions span knowledge management capture tools, enterprise search and related solution sets to maximize knowledge structure, capture, search, find and reuse activities.

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Knowledge Management

Benefits

• Improve value through better answers based on enterprise experience.

• Improve reuse and information sharing of documents, ideas and data.

• Improve client service.

• Improve speed through faster delivery.

• Improve efficiency and productivity through reuse.

• Utilize information assets using new, powerful methods to find what you're looking for.

If you are interested in learning more about Project Leadership's Knowledge Management services, please email Amy Brooks at abrooks@placorp.com or Dan Safran at dsafran@placorp.com.

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Data Integration

Design and implement automated connections between key applications within law firms, which improve data integrity and eliminate manual work-arounds.

Project Leadership improves law firm productivity by creating programs that automatically exchange data between key applications and systems. Typically, staff members create custom programs to synchronize or move data between applications. However, we can eliminate this manual process by using a wizard-based tool to create data exchange rules that are far more efficient than custom coding. Our comprehensive services always begin with helping you identify the business problem at the heart of the challenge, and then map the systems and data that need to be integrated. We then define the rules for data exchange, perform detailed testing, and deploy it to the production environment.

Benefits

• Increase productivity by automating manual processes.

• Lower maintenance costs and improve flexibility by eliminating custom coding.

• Accelerate implementation by leveraging pre-built connectors to common law firm applications.

If you are interested in learning more about Project Leadership's Data Integration Services, please email Steve Taeyaerts at staeyaerts@placorp.com or call 312-441-1283.

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Project Leadership helps law firms and corporate legal departments improve operations by enhancing operational strategy, organization, processes and technology.

Ethical Walls Implementation

Restrict access to documents and records to prevent conflicts of interest, and enforce confidentiality to support client requirements, court rules, best practices and Code of Ethics standards.

To avoid conflicts of interest and enable confidentiality within a firm's client base, law firms must restrict access to documents and records to support client, court and confidentiality in ethical wall situations. Project Leadership implements Ethical Wall and confidentiality solutions, processes and technologies that create, monitor and manage this confidentiality. We advise firms and companies in determining their confidentiality strategy, developing processes, and determining and implementing the appropriate technology requirements.

Technology implementation is but one facet. Integration with document management, records management applications, intranets and extranets are key components to a successful confidentiality/Ethical Wall solution set. Capturing these requirements at the beginning of client opening/new business intake processes is an area where Project Leadership excels and can help.

Benefits

• Avoid conflicts of interest within client base.

• Structure and maintain client and court confidentiality requirements.

• Provide an automated, rules-based process and technology solution set to create, monitor and enforce Ethical Walls and confidentiality requirements.

• Integrate with other information based systems to enforce rules and confidentiality, enterprise-wide.

• Capture confidentiality and Ethical Wall requirements at the beginning of the new business intake process or other client/customer start-up process.

If you are interested in learning more about Project Leadership's Ethical Walls Implementation Services, please email Dan Safran at dsafran@placorp.com or call 312-560-8932; or email Steve Taeyaerts at staeyaerts@placorp.com or call 312-441-1283.

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Litigation Services

Leverage industry-leading electronic data discovery and computer forensic strategies, processes and expertise to support your litigation needs.

Project Leadership can help your organization improve electronic data discovery through our national data collection and forensics services; accelerate design, setup, and training related to the industry standard review tools; and develop highly efficient and profitable litigation support department operations with best-in-class strategies, processes, organization and technology. Our consultants combine our solid understanding of the legal industry and litigation processes with extensive experience in computing systems, forensic investigations, data structures and data mining to ensure that you establish and maintain forensically sound and court-approved processes and best practices.

Sub-services

- **Electronic Data Discovery:** Develop strategies, identify, collect, analyze and prepare electronic documents and other data relevant to legal or compliance proceedings.
- **Computer Forensics**: Collect, analyze and investigate electronic data focusing on anomalies in information to identify fraudulent activity, misconduct, compliance issues, inaccuracies and inefficiencies.
- **Expert Testimony:** Leverage our experts for unbiased testimony on the reporting and analysis of electronic data discovery, evidence recovery and digital forensic analysis.
- **Case Consultation:** Leverage our experts to proactively establish sound discovery practices to manage current discovery and streamline the review process.
- **Litigation Project Management:** Utilize our staff as full or part-time litigation support directors, managers, project managers or support staff to augment your internal staff.
- **Litigation Support:** Access to industry experts in legal technology solutions including Summation, Concordance, Trial Director, Live Note and more to provide training, ongoing support and project management.

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Litigation Services

Benefits

• Ensure electronic data is properly identified, collected using justified methods, and disseminated in an organized fashion.

• Develop industry-leading, highly efficient litigation support practices.

• Gain in-depth knowledge of forensically sound and court-approved best practices and winning strategies.

If you are interested in learning more about Project Leadership's Litigation Services, please email Bruce Malter at bmalter@placorp.com or call 312-876-2793.

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Computer Forensics

Provide comprehensive computer forensics services focusing on the search for evidence in electronically stored information.

Project Leadership's team of well-trained, certified, and experienced computer forensics experts can assist your law firm or legal department with a variety of matters. Our litigation experts only use industry-standard tools and defensible methods to analyze data, conduct research and gather evidence. We provide expert testimony and have a track record of positively affecting the outcome of numerous cases.

Sub-Services

• **Case Consultation:** Project Leadership can assist with determining the scope of a forensics investigation.

• **Identification of Data Points:** Our team of experts can help identify all potentially relevant sources of probative data.

• **Forensic Acquisition of Media**: We use only defensible tools and methods to preserve and acquire data needed for an investigation.

• **Targeted Analysis:** Our consultants are versed in the examination of numerous data elements including email, internet history, deleted data, system information, and file activity and application usage.

• **Reporting and Documentation:** We provide objective reports throughout an investigation that identify notable data, track the progress of a project, and communicate the findings of our analysis.

• **Litigation Support:** Project Leadership is experienced in writing affidavits, declarations, providing and preparing for depositions and testifying in court to bolster your case.

Benefits

• Obtain all potentially relevant data.

• Preserve and secure electronic evidence using methods that withstand judicial scrutiny.

• Minimize cost and business disruption.

• Conduct a structured, repeatable investigation.

• Assist with documentation, reporting and presenting.

• Integrate into litigation function.

If you are interested in learning more about Project Leadership's Computer Forensics Services, please contact Bruce Malter at bmalter@placorp.com or 312-876-2793.

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Litigation Software Services

Improve litigation efficiencies utilizing software applications to support case management, evidence tracking, analysis and firm/department collaboration, trial preparation and transcript management.

Project Leadership can help your organization implement or better utilize Litigation Support software, including Summation, Concordance, Trial Director, Sanction, LiveNote and more. When a new system is needed, our team of legal experts can perform system requirements analysis, recommend the appropriate software, design an efficient integration process, and implement the program to improve overall productivity and increase team collaboration. For organizations with existing systems, our software experts and Certified Trainers can create custom programs to make sure your attorneys are equipped with the knowledge and ability to achieve optimum utilization of all the functions. Utilize the knowledge of our software experts to assist with migrating transcripts, manipulating images, working with production sets, importing documents, building case-specific databases, as well as retrieving and reviewing evidence using software like Summation and Concordance.

Sub-services

• **Strategy**: Evaluate your law firm or legal department litigation support needs and participate in software demonstrations to help your organization find the right litigation software to match your skill sets.

• **Training:** Our Certified Trainers offer fully customizable and scalable training programs to fit your law firm or legal department requirements, schedules and budgets.

• **Software Supported:** Project Leadership allows you to select the appropriate software to meet your business needs. We offer expertise in deploying, configuring, and maintaining Summation, Concordance, Trial Director, Sanction, LiveNote, and CaseMap.

Benefits

• Improve utilization of your litigation software to increase team collaboration and overall productivity.
• Gain a higher return on investment from your litigation software.
• Make it easier for employees to store, access, and retrieve information in electronic form.
• Enable case teams to access information from a centralized database.

If you are interested in learning more about Project Leadership's Litigation Software Services, please email Shana Kirchner at skirchner@placorp.com or call 312-441-0077.

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Litigation Support Application Virtualization

Automate and centralize the management of your entire litigation support application portfolio.

Project Leadership Associates can help your litigation support organization simplify and automate the management of your legal application portfolio by utilizing Microsoft Application Virtualization (App-V). Using App-V, you will be able to centrally access and deploy software packages to virtually any machine in your environment without having to visit the user's desk. This will allow you to increase the speed of updates, improve software and end-user efficiency, and save significant amounts of time and money. No matter how broad or focused your application management needs are, our team of experienced consultants can help you plan and implement the best of breed application virtualization solution. Project Leadership can also help you free up your staff to focus on business-enabling initiatives by providing full-service, ongoing management of your application portfolio.

Benefits

• Shorten the time to update and deploy litigation support applications.

• Lower the cost of managing your litigation software portfolio.

• Streamline and improve update delivery efficiency.

• Improve employee utilization by outsourcing portfolio management function.

• Minimize application conflicts and the effort required for regression testing.

If you are interested in learning more about Project Leadership's Litigation Support Application Virtualization, please email Gordon Dunkley at GDunkley@placorp.com or call 312-286-6602.

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New Business/Client Intake & Lateral Hires

Reduce your risk, increase profits and gain greater operating efficiencies by improving your new business/new client intake strategy.

Project Leadership is a leading provider of new business/client intake and conflicts consulting services. Our unparalleled expertise and leadership in this critical business area is based upon our number of dedicated, experienced consultants; timely, successfully completed projects; and the significant number of law firm clients we represent. We can help your large, medium or small law firm improve the efficiency of its new business/client intake practices to reduce risks and costs to increase profitability. Our standard project methodology begins with an opportunity assessment to review the current state of your business intake/conflicts and lateral hires environment. Based on best practices, extensive experience and deep understanding of law firm business we use this assessment to identify issues, create a conceptual design and develop a proposed implementation plan to get you from your current environment to the new design.

A number of clients request our assistance to help successfully deploy the new design strategically and operationally. We can also help design, select and implement technology toolsets for conflicts, business process management and workflow to further automate your processes to speed the matter opening process while still controlling risk

Sub-services

- **Opportunity Assessment:** We analyze your current new business intake/conflicts and lateral hires strategy, processes, organization and technology and compare our best practices to identify gaps and key issues requiring attention. We work with you to develop key opportunities for new business intake/conflicts and lateral hire process, organization and technology change.

- **Target Environment Conceptual Design**: We design a new business intake/conflicts and lateral hires strategy, process, organization and technology future state and conceptual design. We then prioritize our best practice recommendations to create an implementation strategy that includes a business case and rollout roadmap.

- **New Business Intake/Conflicts and Laterals Project/Program Management and Deployment:** We provide experienced project management to assist you in the deployment of your new business intake/conflicts and laterals strategy, process, organization and technology—getting you to the finish line quicker.

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New Business/Client Intake & Lateral Hires

• **Technology Solution Selection & Implementation:** We research and recommend the best technology tools to fit your needs. Project Leadership possesses business analysis, development, change management and deployment skillsets to help you deploy a number of packaged solution sets. We leverage our unparalleled expertise to automate your environment.

Benefits

• Better risk-control.
• Reduced working capital needs.
• Improved revenue production and profitability.
• Improved control over your lateral hiring approach and processes.
• More productive administrative staff.

If you are interested in learning more about Project New Business/Client Intake & Lateral Hires Services, please email Dan Safran at dsafran@placorp.com or Paula Uscian at puscian@placorp.com.

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Business Intelligence

Increase timeliness of reports to meet business demand through Business Intelligence.

Project Leadership has expertise in a variety of business intelligence platforms. Our consultants are certified in SAP BusinessObjects/Crystal Reports technologies and can provide valuable assistance with system implementation, administration, and reporting.

Project Leadership's consultants can assist your organization with report development. If your organization has a backlog of report requests, PLA can assist on a short-term, ad-hoc basis. PLA can also work with your business users to gather requirements and build customized reports.

In addition to report development, Project Leadership can help maintain your business intelligence environment. Via the implementation of a cost-effective support agreement, PLA will act as system administrators on an as-needed basis to provide services such as: upgrades, security configuration, user maintenance, and troubleshooting system errors.

Benefits

• Improve insight to billing revenue based on a variety of dimensions (i.e. billable rate, practice group, geography, etc.).

• Improve collections with a better picture of your accounts receivable.

• Improve efficiency by clearing your reporting backlog.

• Ensure the Information Technology group meets the businesses' reporting needs.

• Improve system administration (i.e. plan system backup procedures, patch maintenance, etc.).

• Improve system security (i.e. plan and apply security for users and reports, integrate environment with active directory).

If you are interested in learning more about Project Leadership's Business Intelligence Services, please send an email to info@projectleadership.net or call 312-441-0077.

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