

**LITIGATING
ALLOSAURUS (BIG)
MATTERS ON
COMPSOGNATHUS
(SMALL) BUDGETS**

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tcdi 

PANELISTS



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MODERATOR



Andy Cosgrove
Chief Strategy Officer
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Session Outline

1. Introductions
2. General Matter Budgeting Approaches
3. Measuring and Mitigating Matter Spend
4. Unique Issues for Larger Matters and Portfolios
5. Final Thoughts and Audience Questions



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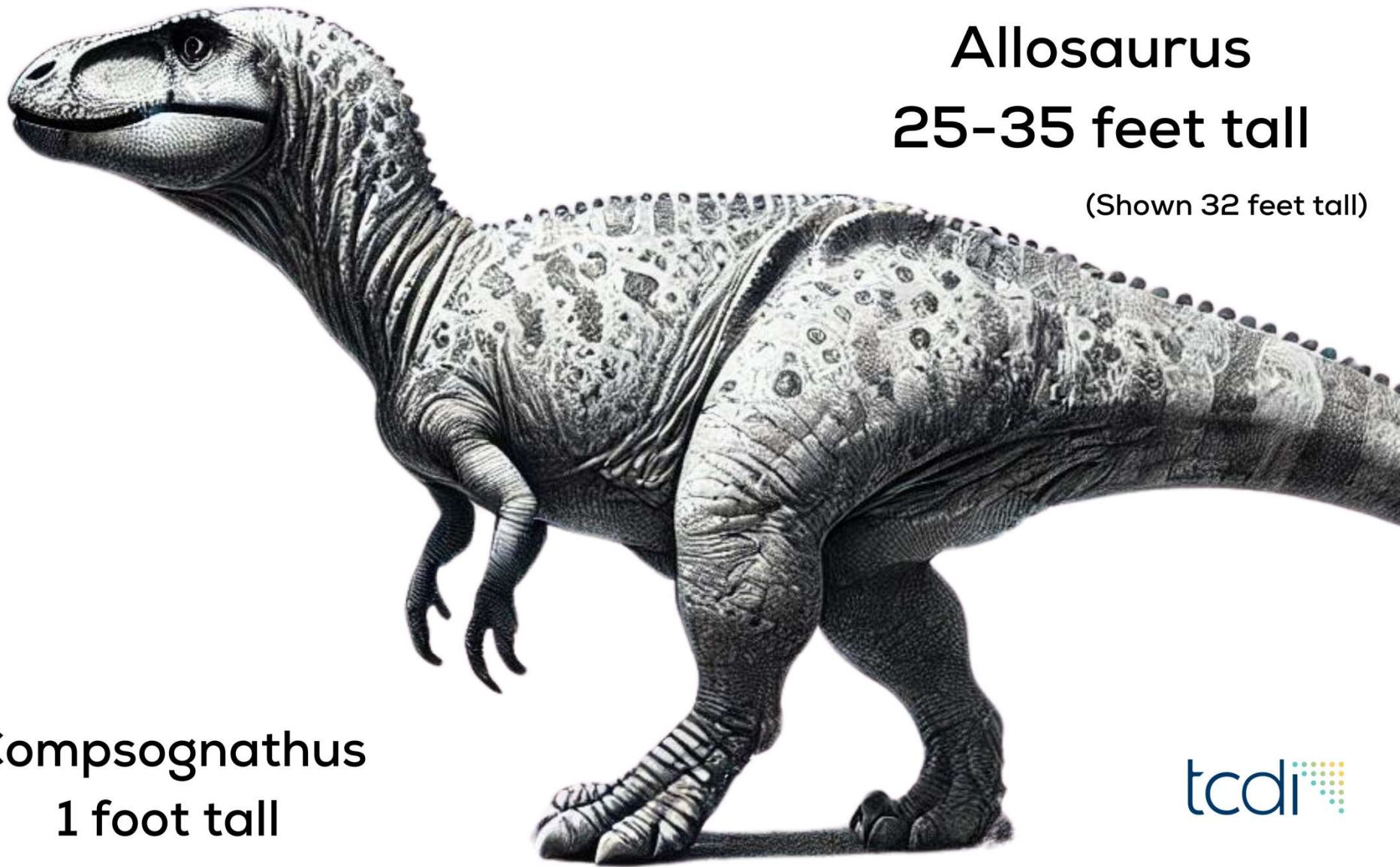
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Allosaurus

25-35 feet tall

(Shown 32 feet tall)



Compsognathus
1 foot tall



General Matter Budgeting Approaches

1. Core components of litigation spend
2. Drafting a matter budget – roles and responsibilities
3. Unique considerations for matters under insurance coverage
4. Dynamic budgeting – evolving budgets for evolving matters



Measuring Matter Spend

1. Key metrics, reports, and status calls
2. Measuring spend tied to key phases & events
3. Leveraging spend management tools and expertise
4. “Realtime data” vs. lagging billing data
5. What gives you the best indication that spend is not tracking to budget?



Mitigating Matter Spend

1. Outside counsel spend management (firm selection, fee structures, staffing, billing rate controls)
2. eDiscovery spend management (fee structures, data reuse, role of law firm vs. ALSPs for document review, AI/advanced tech)
3. Incentivizing matter efficiencies across external partners
4. Bringing tasks (and tech) in-house
5. Managing matter duration?



Unique Issues for Larger Matters and Portfolios

1. How is it even possible to set budgets for complex matters and portfolios?
2. Law firm and service provider alternative fee structures (AFAs)
3. Leveraging innovative technologies
4. Interplay between matter spend and proactive business risk management efforts
5. Managing spend in an expanding docket (vs. a stable docket)



FINAL THOUGHTS & QUESTIONS

*Thank you
for joining us!*

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Andy Cosgrove
Chief Strategy Officer
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