



## DELIVERING STRATEGIC SOLUTIONS ACCA'S 2000 ANNUAL MEETING

### Networking Interview - Technology

#### Carolyn Covault: Selecting And Implementing A Matter Management System at Texaco

**Editor:** Tell us about your career at Texaco.

**Covault:** I joined Texaco in 1986 directly out of law school and am currently in our Houston office after having served in the New York and Los Angeles offices. Throughout my career at Texaco, I have been in the litigation section.

**Editor:** How did you become involved in implementing a matter management system?

**Covault:** When we were looking at implementing a new matter management system, I was asked to lead a team to research what was available and to select an appropriate product for the entire department, not just for litigation.

**Editor:** Tell us about the legal department.

**Covault:** We have U.S. offices in Harrison, New York, and here in Houston with a General Counsel, four Associate General Counsel and a Chief Administrative Counsel. Under the four Associate General Counsel, there are thirteen practice groups, and the litigation section is one of those practice groups. We have approximately 65 lawyers and 40 support staff.

**Editor:** What are some of the technologies currently used by the legal department?

**Covault:** We use WestLaw, LEXIS-NEXIS, the Microsoft Suite (i.e. Word, Access, Excel and Powerpoint) and the Internet. We've used Knowledge Link by Quorum for document management. The legal department has its own home page on the company Intranet which includes attorney biographies with information regarding their areas of expertise and contact details, access to form files, client newsletters, our department manual and links to other legal and regulatory sites and to our key law firms. We just recently added LRN's Legal Compliance and Education Center.

**Editor:** Give us some background on your use of a matter management system.

**Covault:** In the early 1990s we had selected and implemented Modulaw, a mainframe application provided by InsLaw. It was the best product available at the time for our needs. In light of the leaps forward in technology, we felt we should reassess our matter management system. This was the basis for forming the team. Our goals were improved functionality and an increase in both the quality and the efficiency of our responses to client needs.

Modulaw was a powerful system, but it was a mainframe application and not particularly user-friendly. Since it was not intuitive, our people had really not embraced it. Also, it was perceived as focusing on litigation only.

**Editor:** So, your team was looking for a more user-friendly matter management system?

**Covault:** In looking for a new system, the overall goal was increased usage and improved functionality. We wanted greater usage by the lawyers both in managing their own dockets and in getting a more complete picture of the work that was being done by the department as a whole. We wanted improved reporting for the clients and knowledge-sharing so that people would readily have access to the big picture of what everyone was working on - what was facing the department and the company.

**Editor:** How did you make your choice among the various systems?

**Covault:** We selected LawPack after going into the marketplace and looking at what was available. We narrowed the field to five choices and sent our RFPs to those five vendors. The RFPs were sent out in the summer of 1997.

**Editor:** Tell us about the RFPs.

**Covault:** The details were developed by IT professionals who were assigned to the legal department. The RFPs focused on security, budgeting and invoice review capabilities, the breadth and depth of information captured, configurability, flexibility, presentation format, reporting and graphics. LawPack scored very high in all of these areas. Based on the responses to the RFPs, we then narrowed the choice to three products. Those three products were then demonstrated for the team.

**Editor:** How were the demos conducted?

**Covault:** There was a half-day demo of each of the three finalists' systems. Also, each team member was provided with each vendor's response to the RFP questions. At that time, the team consisted of 15 people assembled from the various offices and representing different practice areas. It included lawyers as well as paralegals and other support staff. The goal was to have a representative mix of team members.

**Editor:** On what basis was the final selection made?

**Covault:** After the demos, it was very clear to the team that LawPack was the one to select. It had scored significantly better than the other products on the half-dozen critical parameters that reflected our most significant needs. LawPack really excels in terms of the breadth and depth of the product and its configurability. It is a very flexible product and the security protections offered by the product are very good. We liked its desktop presentation: it has tool bars and a navigation tree with drop-downs and look-ups. It also has really robust reporting capabilities and very strong budgeting and invoicing modules. Another attractive feature is its ability to interface with third party applications (e.g. HotDocs). Also, CompInfo gives the product a lot of R&D support so we knew that it would keep pace with advances in technology.

**Editor:** Were outside consultants involved at that stage?

**Covault:** No, we did not use outside consultants. We had IT professionals within the company working with us. The entire process was Texaco employee driven.

**Editor:** Did you talk to other users?

**Covault:** We visited with one company onsite and spoke with three others. It was very helpful to hear what they had done and how their systems were working.

**Editor:** How did you go about implementing the system?

**Covault:** After we selected the product, we started configuring the system based on the requirements we had

developed. We decided what we were going to track, what fields we needed and what the screens were going to look like. We did that through the team members. They had LawPack on their desktops so they could use it and see what they liked and didn't like. They interviewed their peers and we sent out a formal survey. Then, we did the conversion from Modulaw followed by a testing phase. Then, we started the roll-out and, while that progressed, we cleaned up any inconsistencies that emerged. It is critically important to a successful implementation to involve the kind of representative team that we had created, to ensure that the configuration decisions are well-founded. Senior management support is also critical to success.

**Editor:** Does the system interface with law firms?

**Covault:** No. At the time we implemented our system, CompInfo did not have an EOI product in the marketplace. They now offer Connect II for LawPack, and when we implement an electronic payment and invoicing system in the future, we will seriously consider that product.

**Editor:** When did you get the system up and running?

**Covault:** We went live on February 8, 1999. On that date, we converted all of the matters that were open in Modulaw. We did not bring over matters that were already closed. We now have over 4,000 matters in LawPack.

**Editor:** Was converting the information on the old system to LawPack difficult?

**Covault:** Not for us. There was another company that had done a previous conversion from Modulaw to LawPack. Using their experience enabled our IT people working with an IT outside vendor to do the conversion quite smoothly. There was no loss of the information that we needed in LawPack. We did quite a bit of data clean-up in Modulaw before conversion.

**Editor:** Tell me about your use of LawPack as an inhouse litigator.

**Covault:** Because of the nature of my docket, I use LawPack every day that I am in the office and have come to rely on it. If I am talking to someone about a case on the phone, I can, with a few key strokes, instantly inform myself about the case and have all of the information I need for the discussion by simply going to the navigation tree, double clicking and pulling up the matter that we are talking about. Of our five core data screens, the first screen is an overview screen that gives me a brief case description - the kind of case it is, the inside and outside lawyers, the client and the key issues involved. I can move to other screens to find out more about the parties, what damages are being sought, where the case is pending, current status and upcoming events. At the bottom of each screen there are tabs which, when highlighted, permit me to drill down to even more detail.

**Editor:** Who inputs all this information?

**Covault:** It varies. Secretaries, paralegals and the attorneys themselves. Anyone can input information once they have been trained. We have data entry guidelines so that data input is consistent.

**Editor:** You mentioned the ability to get information about a specific case, how do you search for particular types of cases or develop statistics about the results in your cases?

**Covault:** LawPack has really powerful filtering capabilities that permit you to do quick filters on defined parameters. We can access needed information about our cases very quickly simply by defining the parameters. We can, for example, search for particular types of cases, judges, counsel, clients, issues, locations, case descriptions, defense strategies or any combination of these parameters. These searches can then be reported in an attractive format. We also developed a set of standard reports which provide data of recurring interest based on pre-set parameters and can be run at any time. These capabilities improve our

ability to spot trends for improved analysis and increased accuracy while eliminating duplicative efforts.

**Editor:** Does CompInfo provide ongoing information about the use of the system?

**Covault:** The project manager has been a very valuable source of information. He has a good overall perspective since he works very closely with a variety of clients. There are also three regional user groups managed by the users, not by CompInfo. These groups meet several times a year. We have been to a couple of the meetings and they have been really helpful. At different stages in the process you have different issues and it is useful to talk with other companies who have faced the same issues.

**Editor:** Going back to the process that you followed. Do you have different screens tailored to different practice groups within the department?

**Covault:** No. We did not elect to use LawPack's capability of giving different practice groups different "views" of the system. We had the groups tell us what they cared about and what they wanted to see through their team members and constructed a composite that served the needs of all. Everyone sees the same screens; however, some groups may use more of what is provided than other groups. Certain fields are "required" so that you can't open a matter without completing those fields.

One of the issues associated with using different screens for different practice groups is that if a staff member needs to look at a matter being handled by another group, they may not know how to obtain the information they need in the form they want it. This problem becomes particularly acute at a senior management level where they are looking at matters across various groups. Also, maintaining different screens for each group creates a significant administrative burden.

**Editor:** Can you change drop downs and other features of the system using inhouse people?

**Covault:** Yes. The three IT people who helped us with the implementation are available to help us with such things as adding a field to a screen, changing drop down values and creating new standard reports.

**Editor:** How is training done?

**Covault:** CompInfo provided formal training to our IT people and then put on an intensive two-day class for our fifteen core users back in December, 1998, two months before we went live. This core group trains other users within the department and acts as a resource when people need help. The training is being done in phases in a tutorial style one-on-one basis because each user's needs are different. This individualized approach has worked well because people are able to focus on the things they care about during training.

**Editor:** How do the users feel about the system now that it has been in place for more than a year?

**Covault:** The current user base is very happy with the system. Literally, with a couple of hours of basic training, a new user can navigate around quite proficiently, look at individual cases, generate a report or do a quick query. There is a real sense of accomplishment very early on in using the system.

**Editor:** Has it proven to be an effective management tool for senior legal department management?

**Covault:** They can easily obtain quick answers on matters the department is handling, including total legal expenses accumulated to date. All of this can be done from their desktops. It is an important new management tool which provides a real time overview of what is taking place in the department.

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