

THOMSON REUTERS ELITE CASE STUDY COX SMITH

ACHIEVING CUTTING EDGE OUTPUT PERFORMANCE
WITH 3E TEMPLATES

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COLLABORATING FOR A COMPETITIVE ADVANTAGE

The largest law firm in San Antonio, Texas, Cox Smith provides a wide range of legal services to regional, national, and international clients. The firm has helped thousands of companies handle real world problems involving all aspects of business law and litigation.

In 2007, the firm faced a stability and performance challenge with its document automation system, which was primarily used for proformas, invoices and conflicts reports. Document Studio™, its existing system, was slow in output performance, and it would sometimes leave staff waiting on documents that would turn out incomplete—or never be produced at all. Ultimately, the firm concluded that this system could not efficiently support the increasing amount of data needing to be processed and began to explore other options.

“Our solution was absolutely not meeting our needs,” says Cox Smith Elite Systems Administrator Debbie Ventura. “Struggling with these challenges, I came in contact with a developer of a new data transformation tool that agreed to collaborate with us to create a better solution.” That solution is now known as 3E® Templates™ (formerly Design Gallery™) from Thomson Reuters Elite.

Templates is a document automation solution that streamlines the collection, conversion, and distribution of data within Enterprise® and 3E from Thomson Reuters Elite. The sophisticated capabilities of its advanced automated data transformation design provide more speed and flexibility to support specific and often varied business processes.

In 2007, as an early beta client, Cox Smith had a unique opportunity to affect the product development process and influence desired features in Templates. The process evolved over several weeks that were dedicated to tweaking the background elements and running hundreds of sample documents, meticulously reviewing them for accuracy and completeness.

“All the stars and planets aligned perfectly,” Ventura describes. “What was really appealing about working with the early Design Gallery prototype was that we were able to directly address our problems and fulfill our needs. Having the opportunity to collaborate with a vendor can be really beneficial for both parties; that’s what we found with Design Gallery.”

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Debbie Ventura
Elite Systems Administrator

CONFLICT REPORTING LIKE NEVER BEFORE

The implementation of Templates at Cox Smith is a shining example of the benefits of collaboration. “We began brainstorming ideas with the Design Gallery team for a more web-based feel to our conflict reports and started with the basic need for summarized search results to clearly identify relationships based on adverse status coding,” said Ventura.

Bryan Ramirez, Cox Smith’s IT Director, explains how the previous conflict report process worked. “Before, attorneys would have to comb through many pages of data to make meaningful connections. With our new Design Gallery Client Level Summary conflict report, we’re able to show relationships in the data in a very clean, efficient way. It demystifies the conflict review process to a great extent.”

COX SMITH

Founded in 1939, Cox Smith has 125 lawyers and 120 supporting staff members. The firm’s deep bench of expertise ranges from sophisticated corporate transactions to complex litigation to personal estate planning, spanning over 21 practice areas and with clients in more than 21 industry segments.

CHALLENGE

The firm needed to upgrade its document automation system to achieve better performance for conflict reporting and invoicing.

WHY 3E TEMPLATES?

Templates is an automated data transformation solution that quickly and efficiently streamlines the collection, conversion, and distribution of data.

BENEFITS

- Cut delays and incomplete data in conflicts reporting and invoicing
- More efficient analysis with on-screen conflict reporting system
- Easily integrates with third-party applications
- Reduced resources required to manage streamlined infrastructure

For example, search results clearly indicate how the party submitted for searching is related to existing clients allowing lawyers to make at-a-glance comparisons. Additionally, every client number is listed in the summary section as a hyperlink, directing lawyers to detailed sections for more in-depth analysis. "Because we're able to do direct database queries, we can provide valuable information about that client, such as current status, last bill and pay dates, and other pertinent statistics. It's well-organized and aggregated at the client level, which is the coolest part of the report," said Ventura.

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Debbie Ventura

INITIAL IMPROVEMENTS

Ventura broke down tangible improvements seen as a result of implementing Templates into four categories: Stability, performance, flexibility and scalability.

Stability

Describing stability as an "immediate return on investment," Ventura considers Templates a clean, efficient solution without a lot of overhead. Its stability eliminated concerns they regularly faced with the previous solution. "Before Design Gallery, we experienced quite a bit of inconsistency in data output," she explains. "A major contributor of that, I think, was the amount of overhead or moving parts required in the application that could easily break. That all changed instantly with Design Gallery."

Performance

In addition to stability gains, speed improved dramatically immediately upon implementing Templates. "A document that might have taken half an hour to produce now takes seconds," says Ventura. "I can't even begin to say how excited and amazed we are by how fast the system performs. Proforma runs that would take all day and all night can now be done within hours. It's incredible."

Flexibility

The flexible and powerful platform of Templates gives the firm the creative freedom it needs to explore new ways of automating tasks and improving performance.

For example, the process of configuring and introducing lateral hires is expected to be streamlined with Templates. "We really see Design Gallery as a huge potential for us. Whenever someone has a problem, we suggest Design Gallery as the solution. It's kind of become a catch phrase," Ramirez jokes.

Scalability

Not only is Templates able to handle even the firm's largest source files with ease, it can also be applied to systems other than Thomson Reuters Elite. Because Templates is an XML-based solution, it easily integrates with other applications. "We recognize the ability to use Design Gallery as an interface between other systems, and that's where we really see the scalability potential of the solution," Ventura adds.

RESPONSIVE SUPPORT

Relying on the Templates team to "build a blueprint" for the implementation and ongoing execution of the solution, Ventura and her team understood the importance of communicating goals and effective strategies to achieve them. "When you work with a vendor, you always need to consider the people you're working with and how knowledgeable and responsive they are to your goals. The Thomson Reuters Elite Design Gallery team does a really nice job of that. We have not been disappointed."

Ventura appreciated the Templates team's understanding of the firm's business and technical goals without "reinventing the wheel every time." Not only did the team have a grasp on the firm's desired outcomes, it also had the legal experience to properly execute it. "When you have pleasant people on the other end of the phone that completely understand what you're trying to do and know how to effectively deliver it, it makes all the difference in the world as to how your projects turn out. The commitment level of the Design Gallery team was a primary factor in the project's success."

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Bryan Ramirez
Elite Systems Administrator

NOTEWORTHY INFRASTRUCTURE

Ventura says that the streamlined infrastructure is one of her favorite features. The firm runs Templates in a virtual environment with two virtual servers—one for development and another for production. New projects are built and tested in the development environment and, once perfected, ported over to the production system for go-live—a process Ventura describes as "very easy to maintain."

"I do weekly reboots of the servers, and they all start right up," Ventura explains. "It's one of those wonderful systems that I don't have to worry about. I always know it's going to work."

Infrastructure has been a leading inquiry from other firms, especially those looking to come off of the firm's previous solution. Ventura has been a reference to many that "want to know how Design Gallery is going to make their lives easier." She elaborates, "The previous solution posed support challenges—it required a lot of resources and was limited by the interface and toolsets, as well as its proprietary nature. The message I try to get across is that Design Gallery has none of these issues."

TAPPING INTO THE FUTURE

Templates has already assisted the firm in producing bills and proformas more quickly, and firm management only sees that improving in the future by going paperless. "I think we're going to see a quantum improvement as our billing cycle and reporting processes continue to improve," Ramirez explains. "We have five offices across Texas, so we have no doubt that the benefits of Design Gallery will keep rolling in."

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For more information about 3E Templates, or for a global list of office locations, visit elite.com.

