

# 3E MATTERSPHERE CASE STUDY LANDER & ROGERS

UNCOVERING THE INTERNAL AND CLIENT-FACING  
CUSTOMIZATIONS OF 3E MATTERSPHERE

# LANDER & ROGERS

## UNCOVERING THE INTERNAL AND CLIENT-FACING CUSTOMIZATIONS OF 3E MATTERSPHERE

### EVOLVING TO MEET CLIENT DEMANDS

Since leading independent Australian firm Lander & Rogers was established in 1938, it has developed a reputation in the legal market as a provider of premium legal services and has become renowned among clients for its down-to-earth and friendly culture. Across its three locations, the firm aims to provide services based around a combination of great people, sustained excellence, and exceptional client service.

Like many firms in the rapidly evolving legal industry, the firm has recently experienced an increase in client demand for more transparent access to their case data. For this reason, it became crucial for the firm's CIO Sam Sofianos to find a modernized way to put crucial client information right at their fingertips. Ultimately, he was able to do so using a leading-edge tool that the firm already owned.

The long-term Enterprise® client had previously purchased 3E MatterSphere®, and Sofianos discovered that its functionality would have a profound effect in addressing clients' changing needs and revolutionizing the firm's internal processes overall.

Shortly after Elite released the MatterSphere Client Portal, Lander & Rogers became the first Australian firm to implement the secure, web-based application. The MatterSphere Client Portal enables clients to have online access to matter details and updates on case progression.

"The MatterSphere Client Portal opened our eyes to the full potential of MatterSphere's comprehensive technology, which we had yet to use to our advantage," says Sofianos. "Once my team realized the various ways that MatterSphere could benefit our staff and our clients, it quickly built a positive reputation for itself throughout the entire firm."

MatterSphere is an industry leading practice and matter management platform that integrates with 3E, Enterprise, and many other financial management and document management platforms. MatterSphere facilitates connections across organizations, promotes collaboration across the enterprise, and elevates customer service by increasing efficiency with cutting-edge technology that connects siloed applications and data repositories. Its mobile capabilities make it easy to access case files, action activities, and file time records from a desktop, iPad®, or smartphone. With the Client Portal, files and case updates can be shared with clients, allowing firms to deliver unparalleled levels of customer service, create lasting relationships with clients, and pave the way for new opportunities.

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**Sam Sofianos**  
CIO

### A PRACTICAL APPROACH TO IMPLEMENTATION

Sofianos and his team have been strategic with their rollout of MatterSphere, initially implementing the solution one practice group at a time. The goal for each implementation has been to develop workflows that contribute to a more consistent approach to matters that encompass all of the firm's practice groups.

### LANDER & ROGERS

Lander & Rogers is a leading independent Australian law firm operating nationally from Melbourne, Sydney, and Brisbane. The firm is the trusted advisor to many publicly listed and private Australian companies, Australian subsidiaries of global companies, as well as all levels of government. It has seven areas of practice and covers a range of industry sectors, with a focus on financial services, insurance, government, infrastructure, real estate and retail, and supply chain.

### WHY MATTERSPHERE?

MatterSphere revolutionizes matter management operations by providing firms with a single unified way to view and manage day-to-day activities.

### BENEFITS

- Client transparency through a secure extranet
- Consistent, repeatable matter workflows
- Time-saving functionality
- Customizable configurations

With MatterSphere now currently running in several different practice groups, Sofianos has seen a significant improvement in the speed at which the firm's lawyers and paralegals are able to complete their day-to-day activities. In addition to expediting workflows, MatterSphere has improved staff efficiency by providing full visibility into practice activities, at any time, from any device.

"I can say with confidence that MatterSphere continues to benefit our firm with significant time savings in several ways, including faster matter processes and mobile accessibility," Sofianos states. "However, the single greatest benefit of MatterSphere is that it establishes a structured way of working across our firm, without having to reinvent the wheel."

### CUSTOMIZATIONS THAT MEET CLIENT DEMANDS

MatterSphere has also delivered several time-saving benefits to the firm's clients. Because matter information is now centrally stored and organized, it can be made instantly available through the MatterSphere Client Portal. This feature equips clients with new levels of transparency into their matters, and it does so in real time.

Furthermore, Sofianos and his team have been able to customize the MatterSphere Client Portal in order to better meet client expectations based on their unique, individual requirements. Prior to each deployment of the MatterSphere Client Portal, Sofianos and his team develop a test version that the client is able to preview. This benefits the client with an opportunity to share any feedback that can help Sofianos and his team improve the platform and better execute on its exact requirements before going live.

"It is really beneficial to be able to share the MatterSphere Client Portal with the client during the development process," explains Sofianos. "When the client can envision exactly what the end result will look like and understand how matter information will be retrieved externally, it provides assurance for a smooth implementation."

Sofianos recalls achieving major success when his team developed its first-ever custom configuration of the MatterSphere Client Portal. They worked closely with the client to go above and beyond what was needed in an extranet, and, "The final result didn't just meet the expectations of the client; we were able to exceed them by giving the client more features than they ever could have imagined," Sofianos describes.

*"Overall, the MatterSphere Client Portal has proven to be an invaluable asset to our client service."*

**Sam Sofianos**

And the support doesn't stop after implementation. Once clients are live on the MatterSphere Client Portal, Sofianos and his team hold training sessions to show them how to use all of the application's features. They also offer clients a support line that they can call if they have any issues or questions.

"Overall, the MatterSphere Client Portal has proven to be an invaluable asset to our client service," states Sofianos.

Although the MatterSphere Client Portal has the ability to be customized according to each client's needs, Sofianos and his team are also developing a more standard configuration that can fit the requirements of a wider range of clients, without the need for extensive alterations.

"The great thing about the MatterSphere Client Portal is that it can be easily adjusted for those that have more complex matters," says Sofianos. "But for many clients that have similar processes in place, we are developing a version that can be rolled out across the board more quickly and effortlessly."

Moving forward, Sofianos and his team will also continue to extend the functionality of MatterSphere internally to other practice groups. "By defining core workflows within MatterSphere, we are setting ourselves up for easy and effective deployments that align with our strategic goals," explains Sofianos. "We look forward to eventually rolling out MatterSphere firm-wide and applying its full functionality to the entirety of our matter life cycles."

For more information about MatterSphere, please visit [elite.com/3e/matter-management](http://elite.com/3e/matter-management).

