

How Loeb & Loeb Used Best Authority To Simplify TOA Production

By Judi Flournoy and Heather Morrow

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Technology is meant to save us time on legal briefs, not add to the frustration. If you are considering new software for your firm, you'll have to pick the right one and then properly train your staff. Lucky for you, one firm has already been through the process and is sharing their story.

Loeb & Loeb is a 275-attorney firm with four U.S. offices in New York, Los Angeles, Chicago and Nashville. Traditionally, our firm relies heavily on technology—both software and hardware—to streamline our processes and make our attorneys and staff as productive as possible. In addition to standard products such as Microsoft Office, we also have a lot of legal software products installed at the firm, many of which are integrated with each other to make for a seamless platform firm-wide.

Our litigation departments often need to create a Table of Authorities (TOA), which is a list of cita-

tions that appears in a litigation brief. Up until 2006, our litigation staff was using a combination of different approaches to building TOAs. The process was cumbersome and time-consuming and would usually take several hours to complete.

Loeb & Loeb's Los Angeles and Chicago offices were marking the citations manually and using Microsoft Word to create the TOA. The New York office actually had TOA production software installed—Full Authority by LexisNexis. Unfortunately, Full Authority did a relatively poor job with regard to accuracy—it missed citations or marked them improperly. Many users ended up manually marking citations rather than trying to go back and double-check that Full Authority had done a thorough job. The solution was far from ideal.

In 2006, we began to plan for upgrading the entire firm to Microsoft Office 2003, which prompted us to look at other new products we might want to purchase. Our litigation users told us that we needed to find a better tool for building the Table of Authorities, if one existed. Full Authority was not getting the job done; even though we owned several licenses for it, we knew it needed to go.

We heard about Levit & James' Best Authority product, which was relatively new. Levit & James had a nearly 20-year track record producing legal software, so we decided to see a few demos of the product. Best Authority appeared to be much more efficient than other methods in building the TOA and the interface was user-friendly. The product gave the users a way to mark suspected missed citations, fix incorrect citations, and generate the TOA within the same Word document as the brief.

About the Authors

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Levit & James encouraged us to do a pilot installation of Best Authority before we actually purchased the product. We installed the software and selected a pilot group of 4 or 5 users from our New York office who were to test the software and report back. This was a strategic decision since we knew that we would ultimately need New York's buy-in to lobby for the actual purchase of the product. Levit & James' VP Ian Levit was on-site during the pilot to deal with any troubleshooting or issues that arose. The pilot group was very enthusiastic about Best Authority, so the firm decided to go ahead with purchasing Best Authority in December of 2006.

In February 2007, we rolled out Best Authority to our litigators and their assistants in our New York, Los Angeles and Chicago offices (Nashville's office only has one litigator and didn't really need the product.) We timed the Best Authority installation to coincide with two other major implementations: a firm-wide upgrade to Microsoft Word 2003 and D3, Microsystems' document drafting product.

The litigation assistants were given a full day of training for the combined upgrades. Later on, we did additional reinforcement training, specifically for TOA building with Best Authority. We found that this two-part training strategy (beginner first, advanced a few weeks later) was helpful since people could only absorb so much information during their first class. Allowing them to receive beginner training first, then use the product for a few weeks and finally get advanced training is very effective in maximizing user benefits from software we purchase. The litigation attorneys saw a demo of Best Authority and a few have gone on to try it out. Our plan in the upcoming months is to get the litigation associates into training, so they can leverage this powerful tool in their practice.

Now with an effective TOA building product installed, creating a TOA no longer takes several hours—it takes about 20 minutes. Short documents can take as little as 5 minutes. For any paralegal or legal assistant who has been handed a document to mark up 30 minutes before filing, it's a relief to be able to actually meet that deadline rather than panic over the tight timeframe. This time-savings not only enhances our litigation staff productivity, but it also has a direct financial benefit to our clients who are in turn billed for less time.

Best Authority works seamlessly with our other software products, which include a redlining tool, document management system (iManage) and the aforementioned D3 as well as Microsoft Office 2003. We rarely receive help desk calls or complaints about Best Authority not working properly, which allows our technicians to focus their attention on general IT issues rather than litigation-specific needs.

Best of all, the product's performance is quite accurate. If a citation is incorrectly written, the program marks it as "suspect" for review and possible correction. The TOA editing process is made easier by Best Authority's split-screen interface in which users can compare each TOA citation to its counterpart in the original brief. Also, Best Authority makes permanent all citation revisions, even after multiple edits and re-scans of the document, which is a major plus for our staff.

We have a Best Authority upgrade coming up in the next few weeks on which we'll need to give users additional training. As mentioned earlier, we plan on teaching our litigation attorneys to use Best Authority in addition to reinforcing the skills of our assistants and paralegals, which we think will be a positive development for all concerned.

In the final analysis, efficiency is of ultimate importance in today's law firm. Products like Best Authority are a no-brainer because they benefit our users, clients and workflow with virtually no down-side. We continue to keep our eyes open for new software innovations like this that can revolutionize our internal processes and yield meaningful results.

To schedule a demonstration of **Best Authority**, or start your own in-house evaluation, please contact **Ian Levit** at ianlevit@levitjames.com or (703) 771-1549.

You can download our first of three free E-Learning Modules at www.levitjames.com/bestauthority/BALiteTutorial.html

