

LEGAL TRACKER CASE STUDY

GLOBAL MID-MARKET COMPANY

CONTINUING TO TRANSFORM DAILY WORKFLOWS
WITH LEGAL TRACKER



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Kathie Runyon, legal operations manager for a global mid-market company based in the United States, decided in 2014 to roll out Thomson Reuters Legal Tracker™ (formerly Serengeti Tracker™) to optimize legal workflows. The solution continues to uncover new opportunities to help her legal department boost its efficiency.

SHORT DEPLOYMENT WITH LONG-TERM BENEFITS

The decision to implement Tracker stemmed from an ongoing struggle with an outdated and cumbersome reporting process for which Runyon has no better word to describe than “painful.” Tired of jumping through several hoops in order to produce reports, including importing and exporting data to intermediary systems, Runyon and her team turned to industry peers to find a long-term solution. They quickly found exactly what they were looking for in Tracker.

“We did a lot of research on what other firms and companies were using for efficient and reliable reporting, and out of the vast array of solutions on the market, it felt like everyone was referring us to Tracker,” Runyon recalls.

“The support provided by the implementation team, as well as the overall ease of use of the solution itself, allowed us to roll out the system much more quickly than we ever could have imagined.”

Kathie Runyon
Legal Operations Manager

Runyon and her team were immediately drawn to the customizable reporting services, but they also saw potential benefits across several other areas to be gained during implementation and well into the future. A key differentiator for Tracker is how quickly the system can be

deployed, and it boasts a 99.5% successful deployment rate. This was reassuring for Runyon, who was concerned that without a deep understanding of IT functions, rolling out the system would prove to be a challenging process.

However, with unwavering support from the implementation team, not only were all obstacles quickly overcome, the legal department was live on the system in just six months. That is half of the time Runyon and her team had anticipated.

“The support provided by the implementation team, as well as the overall ease of use of the solution itself, allowed us to roll out the system much more quickly than we ever could have imagined,” says Runyon. “It went even smoother than previous integrations we’ve done.”

COMPANY-WIDE APPROVAL AND ONGOING IMPROVEMENTS

According to Runyon, the overall ease of use of Tracker led to a quick adoption of the solution firm wide, even including those who tend to be technologically averse. She notes that unlike other systems that force users to rely on complicated custom fields to find the information needed, with Tracker, everything is within arm’s reach.

“The intuitive interface Tracker presents makes the system very easy to maneuver,” she describes. “Whatever it is that we are looking for, we know exactly how to find it.”

Since Tracker was rolled out, legal workflows have become much more efficient, and Runyon and her team have found that lawyers are being more productive, and invoices are getting approved much more quickly. “The system’s automation has truly transformed our internal processes,” she claims. “It has been a huge win for our legal department, and we’re excited to see our lawyers adopt Tracker in even more ways.”

One of those ways will be through a new accounts payable integration, which can eliminate a process that currently requires staff to double-enter data into multiple systems. To accomplish this, Runyon and her team enlisted the Tracker Professional Services Team which provides clients

BUSINESS CHALLENGES

This global company needed a user-friendly legal matter management and e-billing solution to automate legal workflows, produce robust reports, and integrate with its existing systems.

WHY LEGAL TRACKER?

Legal Tracker (formerly Serengeti Tracker) is the world’s leading legal matter management, e-billing, and analytics system designed for corporate legal departments and law firms. Distinguished for its ease of use, quick implementation, and quality of support services, Tracker was a great fit for this client.

BENEFITS

- As a SaaS-based solution, Tracker is quick to implement, and it was rolled out faster than this client anticipated
- The system’s ease of use enabled quick adoption, not just by the legal operations staff but by lawyers as well
- The Tracker Professional Services Team supported the company and delivered on its requirements, providing a seamless experience
- With a detailed Tracker road map, the company anticipates it will continue to benefit from various enhancements such as mobile workflows

with ongoing support from seasoned advisors—spanning legal, IT, and financial disciplines. “We are confident that additional features provided by the Professional Services Team are going to help us free up so much of our staff’s time,” Runyon notes.

Runyon also says that the time-saving benefits of Tracker are extending beyond the legal department, significantly impacting the company’s administrative staff. Because reports are much easier to build, admins are spending less time digging through spreadsheets and manipulating custom data. A routine monthly report that once took days to complete can now be generated, and even scheduled, in a matter of minutes with Tracker.

“Much of the legwork that previously went into producing reports has faded away,” states Runyon. Not only has Tracker helped boost the performance of the legal department; it’s also been a boost for Runyon personally: “I am the go-to resource for Tracker, and my profile in the organization has increased as a result.”

Runyon has also found much convenience in being able to accomplish daily workflows from Microsoft® Outlook®, which is always open on her computer. She is able to post documents to Tracker directly within the relevant emails, preventing unnecessary back and forth and keeping her inbox organized and up to date. She is excited about new features coming to the Outlook add-in and further integration with other Office applications, and so is the general counsel.

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 Legal Operations Manager

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 “The real test of an effective matter management and e-billing system is whether or not it is used by the general counsel because if a system isn’t easy to use, they typically won’t use it at all,” she explains. “Our general counsel is very aware of how Tracker is saving us money and time overall.”

Runyon notes that the soon-to-be launched Tracker mobile application will provide even greater benefits to the general counsel who will be able to approve invoices while on the go. She and her team can hardly wait to take advantage of several new features in store with the Tracker product road map.

“It is a priority for us to continue working with the Professional Services Team in order to uncover and take advantage of more potential integrations with Tracker, assuring us that we are getting the full range of benefits offered by the system,” explains Runyon. “We anticipate that all future projects will go just as smoothly as our initial deployment did. There are many more great things to come.”

To learn more about Legal Tracker, please contact your representative at **1-888-736-9587** or visit **legaltracker.com**.

