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— Elizabeth Bethel, Paralegal, Jones, Bell, Abbott, Fleming & Fitzgerald LLP

Jones, Bell, Abbott, Fleming & Fitzgerald L.L.P. Case Study: Paralegals
Elizabeth Bethel is one half of a dynamic paralegal duo who rely on Concordance® to manage their firm’s entire litigation portfolio

Dynamic Paralegal Duo

Over the past decade, legal professionals worldwide have been hit hard by the electronic discovery tidal wave. The most attention, though, has been given to litigators who must manage the e-discovery requirements enforced by the courts and their corporate clients who have grown weary of the soaring invoices for e-discovery work. It's less common to read or talk about the crucial role of the paralegal when it comes to e-discovery.

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—Jamie Ly, Paralegal
Jones, Bell, Abbott, Fleming & Fitzgerald L.L.P.

The fact is that, at many law firms, paralegals and legal assistants are often the day-to-day supervisors of the document collection and management phase of e-discovery. Once the litigators have contested the discovery motions and the e-discovery floodgates have been opened, paralegals are left with the critical job of figuring out just what to do with the mountains of electronic data.

At Jones, Bell, Abbott, Fleming & Fitzgerald L.L.P., there is a dynamic duo of paralegals—Elizabeth Bethel and her co-worker Jamie Ly—who are tasked with the responsibility of managing all e-discovery work for the entire litigation portfolio handled by the firm. Ly and Bethel are responsible for collecting, sorting, organizing, searching, reviewing, redacting, indexing and preparing for production all of the e-discovery that arises from the matters litigated by the attorneys whom they support.

"In a sense, this work is really just an extension of what we already do every day in our roles as paralegals, where we are frequently expected to

collect, produce and manage documents," said Ly. "With e-discovery, though, it's even more important to be organized and to be efficient. The only way that's possible is with the assistance of good technology tools."

Enter Concordance

When Ly arrived in 2009 and Bethel joined the firm in 2010, they realized the potential to expand the use of Concordance software in order to more effectively manage the e-discovery workflow.

Concordance is the discovery management software product from LexisNexis® that more than 70,000 litigation professionals in the U.S. rely upon for electronic discovery, litigation document management and litigation support. Concordance delivers the most cost-effective, in-house solution to manage and review the high volume of documents—scanned paper, e-mail and electronic documents—generated during litigation.

"In the past few years, the volume of e-discovery has grown steadily in our cases of all sizes," said Bethel. "I've also noticed that the e-discovery challenges have become more complex. We have put Concordance to the test in order to help us manage this heavy workload."

"When electronic files initially come into us, our first step is to review the files we can with the attorneys and determine which ones are privileged communications," explained Ly. "Then depending on the type of files we have to work with, we either import them into Concordance ourselves or we send them to outside vendors for processing the electronic data subject to discovery."

For example, PDFs that have already been converted to text or PST files are easily imported into Concordance by Ly and Bethel. For the remaining PDFs, TIFF files, JPEGs, XLS files and

other complex electronic formats, they send them out to vendors who scan and convert all of the files to acceptable formats, filter them down, and then provide Ly and Bethel with a Concordance “load file” that can be seamlessly uploaded into the discovery management database.

Once all the processed electronic data has been loaded into Concordance, Ly and Bethel are able to work with their litigators to search, review, tag, analyze and produce the e-discovery for clients and opposing counsel.

“The secret to our ability to manage the e-discovery workload for a robust litigation portfolio with just a two-paralegal team is that we leverage outside experts and great software,” said Bethel. “The outside vendors have the technical expertise to get the data in and out of the workflow, and the software platform allows us to manage the e-discovery database throughout the lifecycle of the litigation. It isn’t necessary for us to be IT consultants or software engineers, we just need to be able to organize the process and manage the process.”

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The Benefits

Ly and Bethel agree that Concordance has delivered on its promise to make e-discovery management much easier and more efficient.

- **Makes e-discovery management possible**

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- **Faster and more precise review**

“Concordance provides us with a much faster document review process than we would otherwise have to navigate,” said Bethel. “The speed with which I can review electronic files inside of Concordance is just amazing.” Ly also notes that Concordance allows for more precise review, which is crucial in high-stakes litigation, especially for boutique or small law firms with limited internal resources. “Some folks think you can just PDF everything and then review it that way, but the fact is that converting documents to PDF may alter the original creation date or even strip out information in certain fields, which can be very risky for litigators,” she said. “Concordance gives us the platform for more precise document review.”

- **Ease of searches**

“Concordance makes it very easy for me to conduct searches for specific files in a matter,” said Ly. “The wide range of search fields available to users and the flexibility of the search engine allow me to locate the specific documents I need and then to refine searches as I go. That’s a huge time saver for me and one of my favorite features.” Ly also notes that she gets a lot of use out of the “search history” feature in Concordance because attorneys often return to her weeks after she

has run a search and ask her to re-run the same database query. “I just jump onto Concordance and pull up my search history, then run the same thing again without having to remember any of the original details on my own,” she said.

- **File tagging**

“The tagging feature built into Concordance is an excellent tool and easy to put to work for you,” said Bethel. “It’s one of my favorite features in the software because I rely on it for every single matter I manage in order to quickly call up all files related to a similar topic or legal issue in the electronic case file.”

In more general terms, Ly and Bethel have found that Concordance enables them to really provide tremendous value to the litigators whom they support and ultimately the law firm where they work. This is the ultimate goal of any paralegal.

“I love Concordance because it just delivers a huge efficiency advantage for our law firm,” summarized Bethel. “It makes my life as a paralegal so much

easier in every possible way. I’ve worked at other law firms and been forced to use other tools, but there is no doubt that Concordance is the best discovery management software product on the market.”

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