

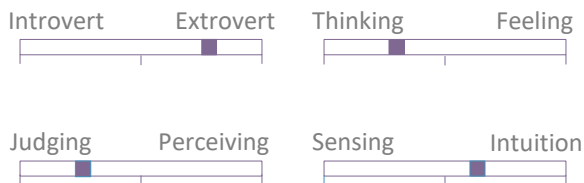
# The General



*“What is the strategy to win the case?”*

Occupation Senior Litigator  
Education J.D. - Juris Doctor

## Personality



## A Day In the Life

My experience is respected, my clients pay me big bucks to go to war on their behalf. I’m constantly making **tactical decisions** and need good information.

Preparation is my key to success. I use **collaborative tools** to draft court documents, witness notebooks and scripts.

My team culls documents and testimony to target key items I review. I tie these **relevant facts to legal issues** and strategize ways to counter my opponent. I **organize case facts** into a logical story to drive case strategy.

I’m frequently out of the office and use various **technologies to stay connected** (desktops, laptops, tablets) and keep my team productive.

## Goals

- **Craft a winning story** by uncovering the needles in the haystack
- **Stay nimble** so we can instantly pivot strategy when disruptions arise
- **Win the hearts and minds of my clients** through exceptional value, service and communication

## Pain Points

- **I’m not a techie** - I need technologies that work the way I think
- **Focus on details** so human error is eliminated!
- **Surprises** disrupt my preparation and profit
- **Effort is duplicated** moving from early discovery to depositions to trial

## Quick Take

Software Used



Work Hours



Industry Experience



Computer Skills



# The Legal Eagle



*"How do we get it done?"*

Occupation  
Education

Associate Attorney  
J.D. - Juris Doctor

## Personality



## A Day In the Life

I make sure the General has the information needed to make timely strategic decisions.

I like to **visualize** what I'm looking at and spend the majority of my day working with data in the app.

Once I do that, I take the time to understand the details of the matter in order to further our case strategy using **keyword lists**, analytics, and some light review.

I'm very sensitive to **time and budget** concerns and often work at home after long hours at the office.

**Controlling chaos**, facilitating clear communication, paying attention to details and staying agile are my keys to success.

## Goals

- Locate and understand **key data**
- Stay on time and under budget
- **Maintain awareness** of what's done and needs to be done
- Facilitate **effective collaboration**

## Pain Points

- Efficiency is key, I'm **short on time**
- I never know when my focus will **change**
- Data doesn't always end up in the system as I **expect**
- My team relies on me to do many things, making me the **bottleneck**

## Quick Take

Software Used



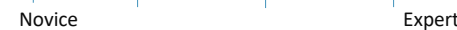
Work Hours



Industry Experience



Computer Skills



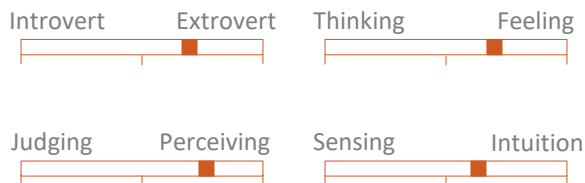
# Review Workhorse



*"Finding the needle in the haystack"*

Occupation    Review Attorney  
Education    J.D. - Juris Doctor

## Personality



## A Day In the Life

I spend all day **reviewing documents**. I want to be as productive as possible the first few years out of law school to move up in the organization.

I work with the **other reviewers** in order to make sure the tagging we are doing is consistent with the group. I spend some of the day understanding the matter at hand in order to make my review quality higher.

## Goals

- Review as many documents as possible with the **highest quality**.
- Move up from the reviewer position to a better one in the legal organization
- **Collaborate** with the review team to get as much work as possible.

## Pain Points

- Review documents using **"as few clicks as possible"**
- Login and immediately get to work
- Reuse data throughout the review
- Documents aren't always served to me in a **logical manner**

## Quick Take

Software Used



Work Hours



Industry Experience

Novice      Expert

Computer Skills

Novice      Expert

# Dashboard Hero



*“Keeping the horses going”*

Occupation  
Education

Review Manager  
BA – Business Admin

## Personality



## A Day In the Life

My day consists of managing **multiple matters** once they are set up by the administrator. I want to monitor the progress of the review and understand how long it will take. Each reviewers performance is important to me.

During review I want to be able to move documents into the **reviewers work stream**, decide when to ask the admin to do a production, and monitor the quality of the review in real time.

Sometimes I setup matter specific things in the app like tag pallets, coding forms, and review passes.

## Goals

- Know **what's going on** with a matter at all times.
- Keep the review team **stocked** with enough processed documents
- Architect the review for a fast, **high quality** work product

## Pain Points

- I get information about the matter in **piecemeal**
- I need **provide status** of the cases for a variety of clients
- On top of my duty to get the review done I **manage the people** on the review team.

## Quick Take

### Software Used



### Work Hours



### Industry Experience



### Computer Skills



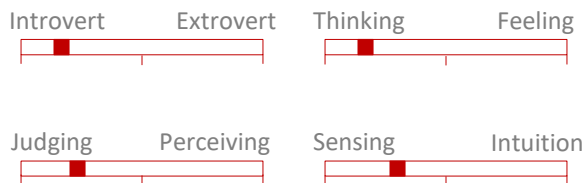
# System Sultan



*“Do you have clearance for that?”*

Occupation    Litigation Support / IT  
Education    BA – IS

## Personality



## A Day In the Life

I spend my day setting up matters for the company. Most of my time in the app is spent adding users, **setting up matters**, and configuring the environments before any work is done by the rest of the team.

Most the time these requirements are given to me via email and I translate them into the constructs of the app.

I spend the other part of my day loading data and making sure my streaming jobs move along, **correcting any issues** that prevent the documents from being reviewed.

## Goals

- **Error free** document discovery
- Never be a road block
- Quickly resolve any administration issues
- **Instantly know** when something is wrong

## Pain Points

- I’m asked to support a **wide range** of requirements
- Handling requests when I’m not at the computer
- I don’t always know if something **went wrong**

## Quick Take

Software Used



Work Hours



Industry Experience



Computer Skills

