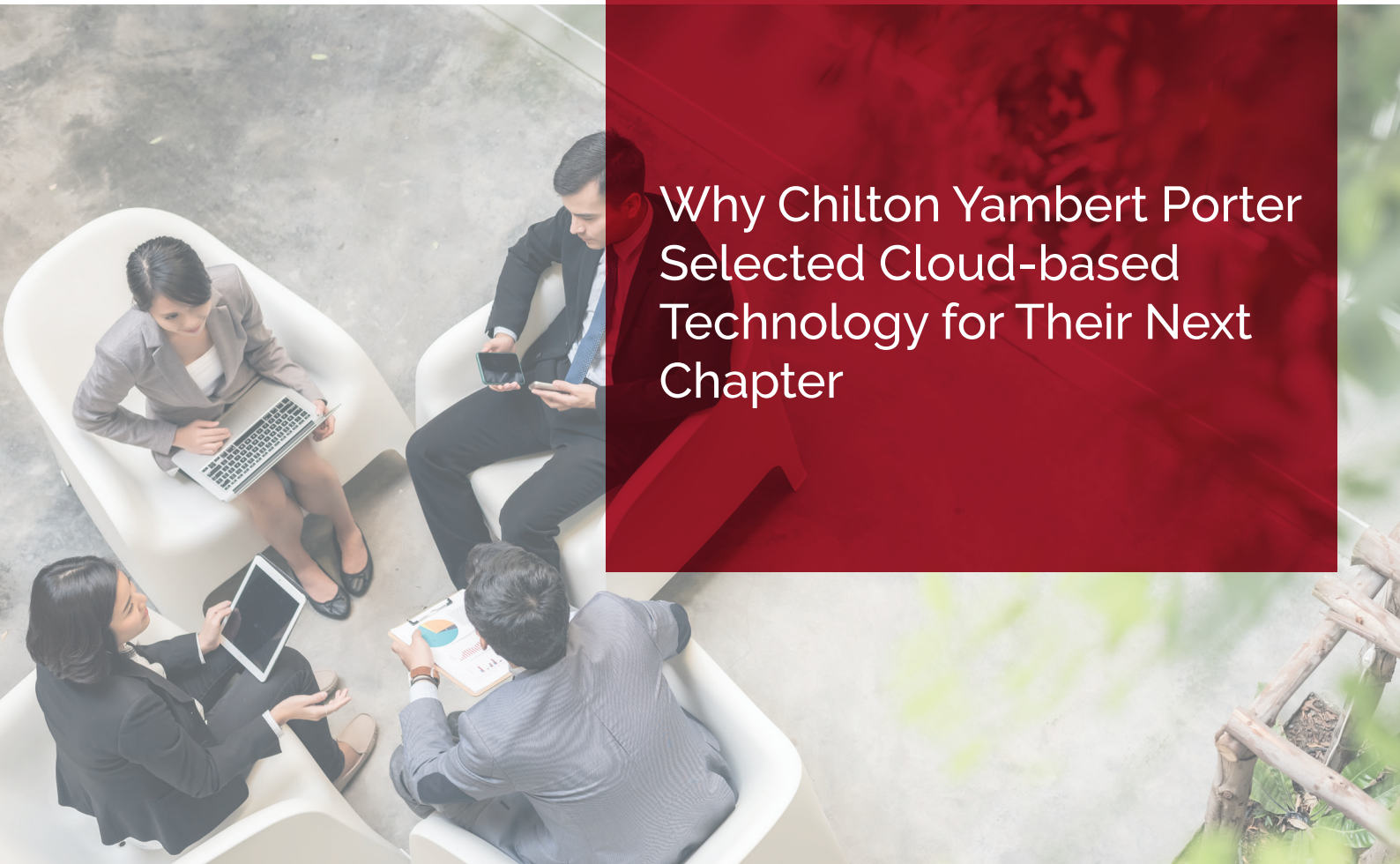




Investing in Efficiency

Why Chilton Yambert Porter
Selected Cloud-based
Technology for Their Next
Chapter





Founded in 1998, Chilton Yambert Porter LLP is a regional law firm practicing in state and federal courts across the country with 43 attorneys. The Chilton Yambert Porter litigation practice is focused on wrongful death, personal injury, commercial litigation and toxic tort. Headquartered in Chicago, they also have offices in Geneva, IL and Madison, WI.

The cornerstone of the firm's success is the belief that when a case is well prepared for trial by the experienced defense attorney who will actually try the case — and the opponent knows that the defense is ready to proceed — the possibility is maximized for the most favorable resolution.

And the courts agree.

Prevailing in a 7-year pension-spike litigation that closed in February 2019, and that was covered by the Chicago Tribune, Kathryn Thomas, a Chilton Yambert Partner, was introduced to the entire courtroom by Judge Neil Cohen. Judge Cohen noted that Ms. Thomas obtained one of only two Summary Judgment rulings he issued in 2018.

Investing in Efficiency

For Chilton Yambert Porter, delivering exceptional client service goes beyond good lawyering. Quality representation is the combination of both legal and business acumen.

Corporate clients expect their outside counsel to operate efficiently. This includes leveraging technology to manage cases and provide billing that is timely and compliant with corporate guidelines. To not just win but win cost effectively. When a robust and growing firm like Chilton is ready to invest in new technology, the selection of products must align with their mission of providing extraordinary legal representation and delivering extraordinary results.

Considering the Cloud

Chilton Yambert Porter's infrastructure resided on a server-based system, which included time, billing, case and document management software tools. A full review of options began by the team.

As Rachel and Cherie worked through the evaluation process, they identified that upgrading to a new version of the existing billing system, while possible would be expensive and still not provide the functionality required to support the growth of the firm. Also looking to transition away from their server-based file system a robust document management program would be needed to organize both historical client files and support the additional practice groups.

The Team agreed to look beyond their current platform and investigate new solutions in the marketplace. Why waste money on a system that doesn't work well for us?"

The 35*45 Consulting Partnership

The first step was to work with an experienced team, to identify tools that would both solve current challenges and accommodate future growth. As well as offer opportunities for continued optimization or improvements. Houston based 35*45 Consulting came highly recommended, specifically by law firms who are transitioning from server-based software with a need for complex billing tools or customization.

Selected Solutions

Chilton Yambert Porter chose Centerbase for integrated matter management, billing and accounting. Centerbase is a cloud-based platform that is secure and offers a high level of customization, workflow automation and robust reporting.

To improve document management, Chilton selected NetDocuments® which seamlessly integrates with Centerbase and offers collaborative workflow, enterprise search, secure permissions-based access and one central place for document archiving.

Planning and Preparation

Chilton Yambert Porter expects the same level of preparation, foresight and expertise that their team devotes to its matters, in their partners. When selecting 35*45 Consulting both organizations agreed on an extensive and detailed implementation plan. Complete with testing, support, and ongoing training for staff. Followed by a second round of customization to optimize both Centerbase and NetDocuments as staff began to use the new tools in everyday practice

“ Why waste money on a system that doesn't work well for us? There are other systems with the features and functionality we need now and going forward. ”

Cherie Emling
Personnel Manager & Paralegal
Chilton Yambert Porter LLP

The Centerbase Pilot & Rollout

With Chilton Yambert Porter's realistic approach to adapting technology to the needs of the business, Cherie and Rachel chose the practice group with the most complex billing challenges for the Centerbase pilot; the toxic tort group. A group who required "split billing" capabilities, as multiple insurance clients are often involved in a single matter, something their current billing system could not handle.

Steps Required:

1. Creation of a working copy of the data for testing
2. Data cleanup prior to the migration
3. Mapping the old data to the new Centerbase platform so that the data was usable in the way intended and that it supported the use of all the new features
4. Creation of a test database for the end users so they could report on what worked, what didn't and what functionality they needed to be enabled prior to the migration

The data conversion was insufficient to support the split billing functionality, so 35*45 Consulting executed manual coding to enable split billing features and functionalities. A common challenge encountered when migrating from server-based systems contributed to the selection of 35*45 Consulting, who employs staff with deep database expertise in all law firm technology systems. Once the functionality was confirmed, a full rollout commenced. Again, this was done initially on a working copy and then on the live database.



Specialized expertise in both the firm's existing billing system and in Centerbase proved invaluable when it came to managing the data migration in a manner that supported the new functionality. Perhaps even more important was their expertise in training and support and their devotion to client support. The technology is useless if it is rejected by the end users!

The Results:

- Split billing capability
- Easier payment entry
- Increased automation
- Use of 'pick lists' rather than freeform entries for consistency and more compliant billing
- Firmwide adoption and embrace of the new platforms
- Significant opportunity for continued customization that will improve process controls, effectiveness and quality.



NetDocuments Adoption

The NetDocuments migration was far less complex from a technology standpoint but no less important. For Chilton Yambert Porter, this was not about transition to “paperless,” said Cherie Emling. Rather, it was about “organization and the increased ability to readily find needed information, something that is challenging in a server-based file structure.”

Again, Toxic Tort was the perfect starting point. The practice represents Chilton Yambert Porter’s insurance clients across multiple matters. The ability to quickly and easily locate documents from previous matters concerning the same issue for the same client, or similar issues for a different client, and leverage that work was a primary motivation for adopting NetDocuments.

Ms. Emling notes that the goal is to move beyond the “hunt and peck” for information and to enable the litigators to easily answer the following:

- “This is what happened.”
- “This is why we did what we did.”
- “This is what we need now.”

In addition to those questions, perhaps the most frequently heard question is, “Does anybody have...?”

The benefit of enhanced access to the vast stores of matter-specific knowledge accrues to the firm and the client alike. It improves the efficiency of more routine work such as motion practice and pleadings, as well as the substantive work in developing case strategies, managing multi-district litigation and joint defense groups and other complex commercial litigation.

“Elizabeth Nguyen-To our 35*45 Consulting Project Manager was able to work with the old system and explain to me how it worked in the new system before the migration happened.”

Rachel White
Billing Manager
Chilton Yambert Porter LLP

Moving Ahead

35*45 Consulting has ensured that the technology is delivering the benefits envisioned by the firm, that the end-users were properly trained and supported and that there is continued adoption. But this is hardly the end of the story.

Customization and improvement of the Centerbase workflows is envisioned. Just a few short months into adoption, the firm already sees significant opportunity for enhanced auditing, reporting and improvement to individual attorney time entries and billing practices. The firm has also begun rolling out document management best practices, such as developing document naming conventions to fully advantage NetDocuments.



To learn more about how 3545 Consulting Global helps law firms transition to the cloud connect with them at 713-789-3323 or by email at info@3545consulting.com.