

Optimizing eDiscovery Project Management: Service Provider Case Study



Shepherd Data Services

<http://shepherddata.com>



Executive Summary

Shepherd Data Services, an eDiscovery services provider, was one of the earliest adopters of Agility Blue. As their business grew, they needed to find a way to better manage an ever-increasing volume of eDiscovery and digital forensics work. After adopting Agility Blue, Shepherd Data now manages all their client and internal projects within the application.

Shepherd has reported a quantifiable ROI directly attributable to implementing the software. They are continuing to explore the application's reporting features, and have created additional workspaces to manage a variety of projects and initiatives. They are also using Agility Blue's API to integrate with additional software applications.

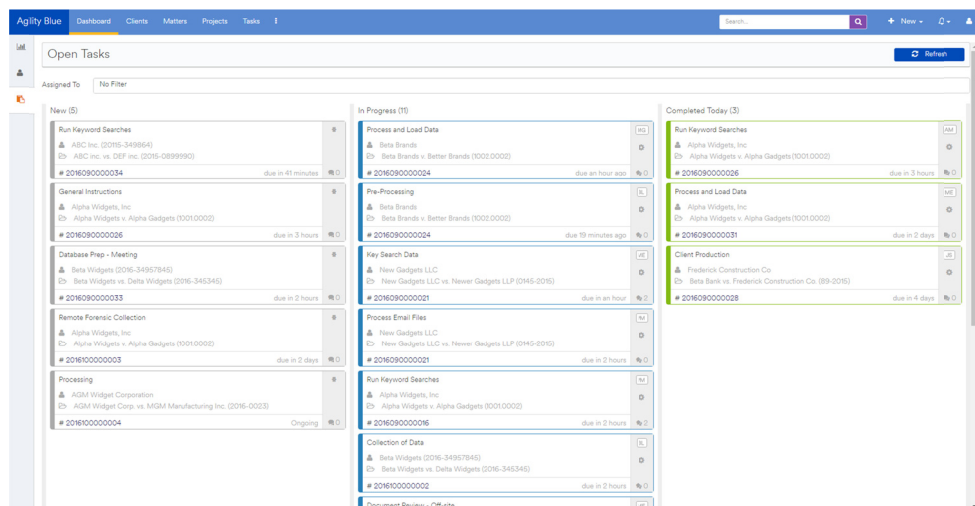
"As an eDiscovery project manager, my job involves managing different teams on a wide variety of projects. Before Agility Blue, I had to use various spreadsheets and other tools to manage our workflow. Agility Blue makes everything so seamless and centralized."

— **Jennifer Stegora**, eDiscovery Project Manager.

Challenges

Shepherd needed a project management tool that was robust enough to manage a high volume of work with many moving parts, and tailored to the precise demands and fast turnaround time of litigation support projects.

They also needed to find a way to improve internal communications between project managers and technical team members, as well as to be able to give accurate and timely project status updates to clients more quickly and easily.



Agility Blue Open Tasks Dashboard

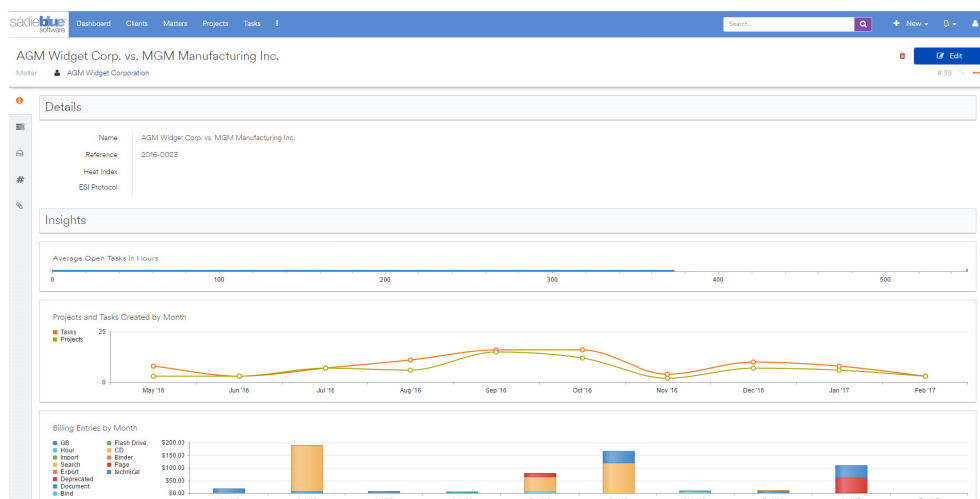
Shepherd had tried various tools in the past, but none of these offered the features and customization they needed to support their workflows.

How Agility Blue Helped

After implementing Agility Blue, Shepherd data was able to on-board their staff members quickly, and imported several years of historical client and matter details from legacy systems.

Shepherd's project managers now use Agility Blue's dashboards and notifications to monitor team projects in real time, and to quickly report on clients' project status.

Shepherd's technical team members use the application to see their own assignments, report on progress, communicate with team members, and track billing.



Agility Blue Matter Details Screen

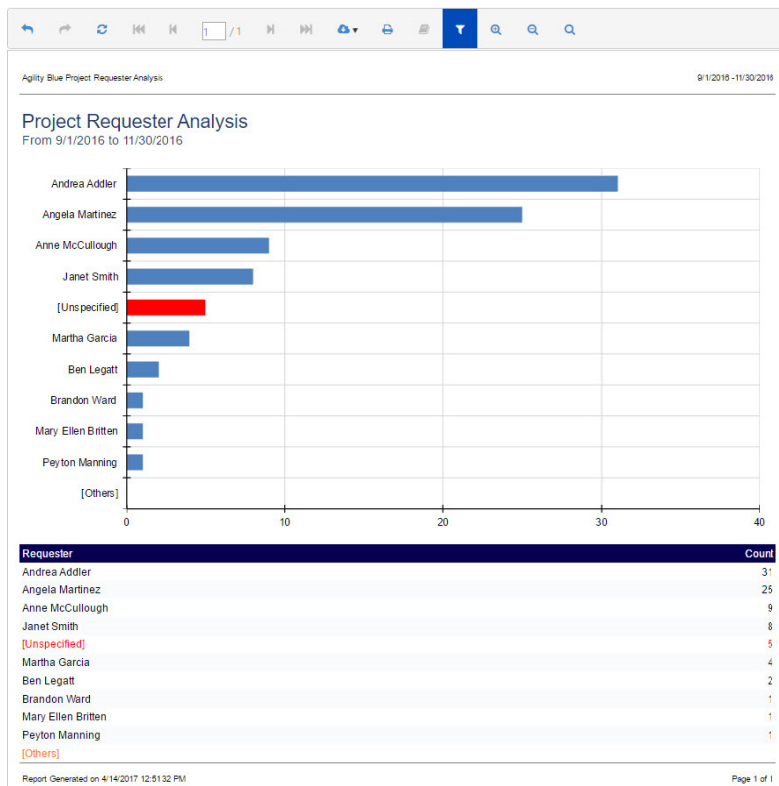
Finally, Shepherd worked with Sadie Blue Software to design custom reports to pull and display historical data on matters, billing and team member productivity.

Results, ROI and Future Plans

The result of adding Agility Blue to Shepherd's workflow has been positive, and the return on investment has been significant and quantifiable for the company.

The application has benefitted Shepherd's business in three key areas:

- **Increased productivity** of technical team by 30%, through Agility Blue's streamlined, repeatable workflows and staff assignment optimization.
- **Higher client retention rates**, attributable to improved communications with end clients, due to the solution's centralized repository of project history.
- **Greater revenue capture** on projects, by adopting Agility Blue's powerful integrated billing tracking system.



Agility Blue Custom Reports

Shepherd's future plans for their Agility Blue instance include continued refining of its custom reports, as well as exploring the potential of the API to connect and integrate with other software platforms they use on a daily basis.

For more information on Agility Blue, or to test out the application, visit us at www.sadiebluesoftware.com.

"As a web-based SaaS application, the implementation process for Agility Blue involved no additional hardware investment, and my busy staff does not need to worry about software maintenance and upgrades – this is a big plus for our team."

– **Steven Servatka**, Systems Administrator