Thomson Reuters HighQ
Benesch Friedlander Coplan & Aronoff LLP

Creating Client Portals That Deliver Competitive Advantage

Benesch Friedlander Coplan & Aronoff LLP (Benesch) is a law firm that prides itself on deploying top-notch technology to support its 275-strong team of lawyers to work efficiently and effectively and to meet the needs of its diverse client base. It is a full-service firm headquartered in Cleveland, Ohio, with 11 offices in the U.S., China, and the UAE. In the past five years, it has started to really take full advantage of its deployment of Thomson Reuters® HighQ, the connected, automated workplace collaboration solution that facilitates and streamlines project, litigation, transaction, portfolio, and compliance management all in one place.

Benesch already had HighQ in place, using it for basic file and folder management purposes, when IT Business Process Manager Bob Thorne joined the firm in 2016. He quickly realized that HighQ offered a huge amount of untapped potential that could deliver significant benefits. His first successful foray into developing its wider capabilities was in demonstrating to the corporate department how HighQ could overcome the difficulties inherent in using and sharing multiple versions of Microsoft® Excel® spreadsheets when working on major transactions.

A Single Record of Truth

Thorne showed the department that they could use the iSheets module in HighQ to create a sophisticated, secure data room which would act as what he calls, "a single record of truth in real time, accessible from any device." Lawyers and clients don't need to keep track of document status or hunt down the latest version, saving time and

> *"HighQ has been a value-add for us—helping us with business development."*
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> **Bob Thorne**
> IT Business Process Manager

reducing the risk of error. Standard fields, such as date fields and dropdowns, allow users to verify they have consistent data on which to create overviews, set filters, or build reports.

This early "win" was then rolled out across the firm and opened the door for further discussions around other HighQ components, capabilities, and customizations the firm could consider. As a result of those discussions, setting up a data room or client portal is something the firm routinely offers to clients as part of their service, so clients can see and share documents and data and collaborate with their lawyers. One of the main advantages of HighQ is that further functionality can be added in over time, so that the portals evolve along with the clients' needs.

Although not all clients require a data room or client portal, Thorne points out that, for many, the option to have one created for them is a competitive differentiator for Benesch. It offers a secure, accessible way for clients to engage with their legal teams and view progress at no extra cost. "Where appropriate, HighQ is part of any pitch or proposal we put together: Showing potential clients its capabilities and the HighQ environment can help us win business," explains Thorne.

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Visualizing Data and Tackling Tasks

There are many other reasons why HighQ is so attractive to lawyers and clients alike. Key among them is the granular visibility it offers, using dashboards to clearly display critical information such as matter status, events, and team details. Benesch has also added in the optional Data Visualization module to provide C-suite-level intelligence via what he describes as, "pretty pictures that are easy for anyone to digest at a glance." Essentially, this module allows large sets of data from other HighQ modules, such as status breakdowns from iSheets, to be rolled up and summarized into graphs, charts, and KPI cards.

Even better, from the main screen, users can click on charts and do a deeper dive into the information displayed in the graphic. Many of Benesch's client portals incorporate these high-visualization dashboards, and all the data fields that sit behind them are fully customizable and pre-filtered, so the firm can create exactly the right structure for each client.

Another key feature of HighQ for Benesch is the Tasks module. This meets the needs of the vast majority of lawyers and clients who want some sort of project management capability, but find that most of the tools available on the market are far more complex than they really want or need. "People's eyes often glaze over if someone mentions terms like 'critical path,' when what they really mean is they want some straightforward ability to assign tasks. They want a list of the various to-do's, who has been assigned to do it and if it is done, and reminders and alerts to help keep people on track. This is where the HighQ Task module has been a wonderful 'project management-lite' tool—and it's all right there in the interface." He adds that the data visualization capabilities are also invaluable when it comes to using the Tasks module to easily keep track of various tasks required on different matters.

This cross-pollination of modules takes HighQ up a notch. There is no silo for iSheets, no silo for Files, no silo for Tasks. They all integrate natively and intuitively right within the interface."

Bob Thorne

"When I started to see capabilities like tasks, events, even metadata, I realized we had a lot of firepower that we could take advantage of with HighQ."

Bob Thorne

Thorne is impressed by the seamless integration he sees across the different HighQ modules, which promotes efficiency. For instance, when someone uploads a document in the Files module, it can be assigned to a user as a task, with start/end dates and reminders added—without needing to go separately into the Tasks module to do it. "This cross-pollination of modules takes HighQ up a notch. There is no silo for iSheets, no silo for Files, no silo for Tasks. They all integrate natively and intuitively right within the interface," he says.

Management and Collaboration

Sharing and collaboration are by no means limited to iSheets: Instead of having to download files, users can make edits on any document within the interface if they have permission to do so. Documents can also be set to Read Only for certain users. Version management functionality is built in—a critical feature in the legal sector where "versioning and 'red-lining' are key," as Thorne puts it. It is easy to export files, print them, or turn them into PDFs, and there is a powerful search function, all of which make it easier for lawyers to do their jobs.

Security is a critical factor in giving comfort around sharing and collaboration, and HighQ provides very detailed settings as to who is allowed access to what. Sometimes there are multiple parties involved in a matter, and while it is helpful for the Benesch team to be able to share some aspects of the data room with third parties, it is not necessarily appropriate for everyone to be able to see everything. Therefore, some folders can be made available to anyone who has access to the data room, while some sections such as the Tasks module will be restricted just to clients and the Benesch team. This can even be done on a folder-by-folder basis if need be. "We can have a matrix of permissions," says Thorne.

Use Case Example: Innovation in Real Estate

One example of how HighQ has had a clear impact on enabling Benesch to serve client needs more effectively is in the firm's real estate practice, where the firm has created more efficient, innovative records management systems. Clients who own multiple assets, each of which may house many tenants, can often struggle to keep track of all the various important details, such as square footage, main contacts, and lease renewal dates. Benesch has incorporated all of these details into one single point of reference that also includes trackers and reminders for important dates and locations of documents, making the management of them easier and better organized.

HighQ acts as an activity tracker, enhancing portfolio or litigation management by flagging up when there has been a prolonged period of inactivity (around 30 days) on a particular matter or action. "If we have hundreds of entries on our system, it can be hard to see what has fallen by the wayside and what is at risk of becoming 'stale.' The View capabilities in HighQ allow you to slice and dice data in different ways; that's really key for portfolio management," says Thorne. "We can also see where bottlenecks are occurring internally or externally that are holding up progress."

Thorne emphasizes how quick and easy it is to set up a client portal or data room, with all the necessary workflows and permissions—usually within a day—and it is possible to do so without any tech background. Moreover, very little in the way of user training is required. "The speed of customization is a welcome surprise for clients and the lawyers alike," says Thorne.

Benesch is a stand-out example of how firms can make use of the wide range of capabilities HighQ offers, growing its deployment organically from standard document management at the outset to become the go-to hub for internal and external collaboration today. Overall, it gives the firm enormous efficiency in its operations, flexibility in how it is used, and agility to suit each different client and adapt over time—all of which add up to business success for Benesch.

"What clients need now and what they need in three months' time may change. HighQ can be an evolving environment that can adapt over time."

Bob Thorne

BENESCH FRIEDLANDER COPLAN & ARONOFF LLP

Benesch is an Am Law 200 law firm serving U.S. and international clients across sectors as diverse as construction, healthcare, insurance, retail, hospitality, manufacturing, private equity, private client and family offices, and not-for-profit.

BUSINESS CHALLENGES

To deal with the difficulties caused by having multiple versions of documents, the firm wanted a solution that would create "a single record of truth" that could be accessed from anywhere on any device and shared securely with clients.

WHY HIGHQ?

For Benesch, HighQ is a "one-stop shop" that creates sophisticated yet simple-to-use data rooms or client portals, with advanced functionality and extensive scope for customization, enabling lawyers and clients to collaborate easily and allowing for evolution over time to fit with changing needs.

BENEFITS

- Brings together document, project, transaction, portfolio, and litigation management all in one place
- Provides an intuitive interface with extensive data visualization and seamless integration of modules
- Boosts efficiency by saving time and reducing risk
- Allows for saving highly customized sites as templates, reducing turnaround time in advanced site creation
- Increases mobility with documents accessible on any device in real time
- Delivers the agility to fit client needs now and in the future
- Ensures security, giving comfort over sharing to lawyers and clients alike

For more information about HighQ, contact your HighQ Client Success Manager or visit HighQ.com.

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