



PBworks Legal Hub

Five Ways to Boost Billable Hours and Client Satisfaction with Legal Collaboration

WHITE PAPER

PBWORKS

Overview

PBworks Legal Hub helps law firms increase attorney and staff productivity, boost billable hours, and improve client satisfaction by enabling more effective collaboration, both inside and outside the firm.

Many of our current customers are successful law firms who have used PBworks' collaboration solution to generate concrete benefits in a number of key areas, such as case management, client extranets, deal rooms, practice management, and operational knowledge sharing. Firms can increase per-attorney productivity up to 100 billable hours per year while improving the effectiveness of supporting staff. That's why PBworks is used at 24 of the top 25 law firms in America.

Using Legal Hub in your firm

This white paper describes how your firm can benefit from using Legal Hub as a collaboration platform:

1. Improve the management and coordination of cases with secure, shared workspaces
2. Increase client satisfaction and retention by providing a secure extranet for each client matter
3. Accelerate transactions with a secure, rapidly deployed, universally accessible, and secure and auditable deal room
4. Build real value for your firm in "practice management" by leveraging existing knowledge and maximizing the utility of your attorneys' time with a legal knowledgebase.
5. Document and share organizational knowhow with an easy-to-use intranet for your firm

Let's take a more in-depth look at each of these uses.

1. Case Management

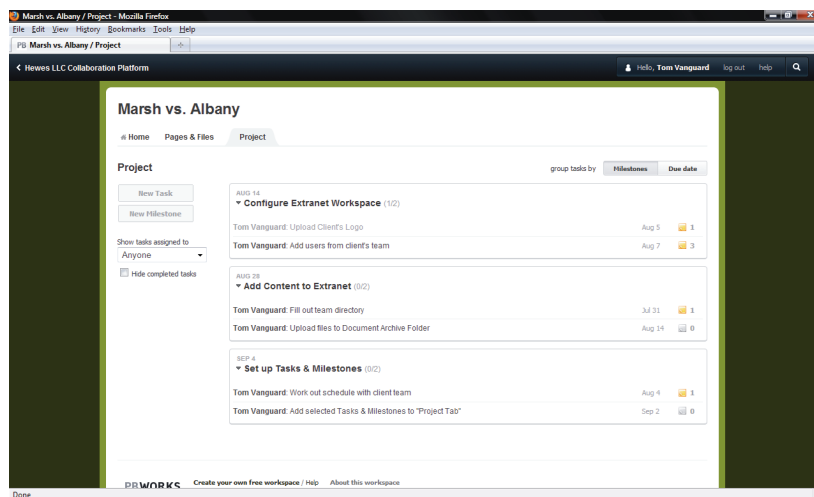
- Use a customizable template to create a shared workspace for each case
- Collaborate on case strategy and administration to maximize team productivity
- Assign, track, and collaborate on important tasks and milestones
- Link to case facts in documents, outside databases, your DMS, or on the Internet

Pertinent information for your cases is distributed in your document management system, your email, and most of all, in the heads of your litigators. You need a way to link them all together. Use PBworks to create a workspace for each case and link to all the relevant case facts, even when they are dispersed in different systems. Your team can find facts immediately, and invest their time in crafting the ideal pleadings. And because PBworks gives you the ability to create an unlimited number of customizable templates, you can create firm-specific templates for each different kind of case (e.g. personal injury, wills & estates, etc.).

The screenshot shows a web browser window displaying the PBworks interface for a case workspace titled "Marsh vs. Albany / FrontPage". The interface includes a navigation menu on the right with options like "Create a page", "View files", and "Project". The main content area shows a "FrontPage" with a welcome message and a "Case Administration" section. This section contains three columns: "Contacts/Communication" (with links for Contact List and Case Teams), "Calendar" (with a Shared Case Calendar), and "Case Fact" (with links for Case Chronology, General Case Notes, and Important Case Facts). Below this is a "Case Strategy" section with sub-sections for Strategy Meetings, Assignments & Updates, and Client Information.

You can also save time and improve efficiency by creating a single place to coordinate your team's efforts. Publish a directory of case team members, keep track of team and court calendars, archive your meeting notes, and track progress towards your goals by assigning tasks and milestones. You can access this information from anywhere via PBworks' mobile interface for iPhone and Blackberry. Your case notes and strategy are always just moments away.

PBworks is especially useful for complex and long-running cases, where your team is likely to include attorneys and staff from multiple offices, as well as local or co-counsel. It's difficult to use shared servers due to firewall issues, which makes a hosted product like Legal Hub a big help when it comes to providing a searchable, centralized clearinghouse for case information, including memoranda and pleadings. You can sort information into different issues, and link to other resources as needed in an intelligent way.



2. Client Extranet

- Use customizable templates to set up a shared workspace for each client matter
- Upload documents for review by either side
- Collaborate on drafting and revising documents
- Reduce time-wasting and unsecure email chains by up to 90%
- Capture and archive meeting agenda and notes

Using email to collect and exchange documents with your client is slow, unsecure, and prone to error. Most attorneys spend over 75% of their computer time reading and writing email. Set up a secure, externally-accessible workspace to collect and review your documents with each client, and you can minimize errors and slash repetitive email chains. As with case management, you can create a custom template that already includes your firm's standard documents and policies.

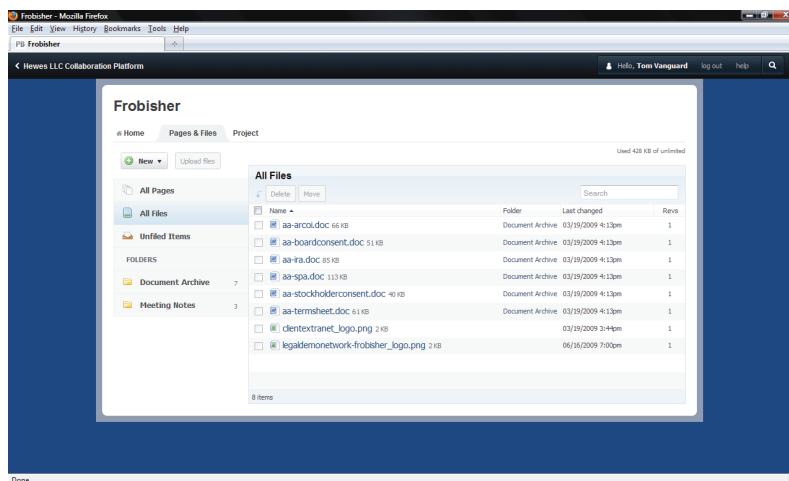
How many times have you had a client lose an important document? How many times have you been forced to email the same document over and over? How many times has confusion arisen between your attorneys and the client over which version of a document is most current?

Online collaboration with the client improves the quality of your interactions with the client as well as the productivity of your attorneys and staff. And by providing greater transparency and accountability, you can increase client satisfaction as well.

Client extranets are especially useful for transactional attorneys, who need to handle numerous client matters simultaneously. It's hard to sort the communications and documents associated with five different matters when they all live in the same inbox. Set up separate client extranets for each matter, and it's easy to separate and distinguish one's work. This clear demarcation between client matters also helps make usage of Legal Hub a billable activity, versus sorting through a shared email inbox, which is generally not billable.

3. Electronic Deal Room

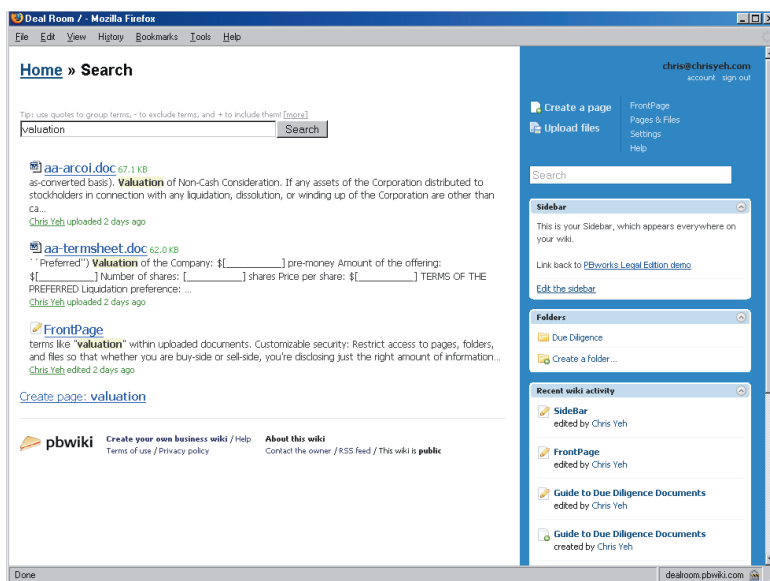
- Set up an electronic deal room in just minutes
- Configure access controls to make sure you're disclosing just the right amount of information
- Use "audit mode" for comprehensive monitoring of all access to information
- Search within documents to find that needle in a haystack, and do so from your BlackBerry or iPhone



PBworks offers a powerful electronic deal room solution for M&A, spinouts, and bankruptcy proceedings. Not only is PBworks much faster to deploy, easier to use, and more affordable than traditional electronic deal rooms, PBworks offers a number of key differentiating features.

A PBworks deal room is accessible from anywhere on the Internet and even via iPhone or Blackberry, but only to authorized users. PBworks offers robust security, including the ability to restrict access to pages, folders, and files so that you're disclosing just the right amount of information. For example, you can set up a due diligence folder so that members of your team can upload relevant documents and edit the page describing these documents, but potential acquirers only have read-only access.

Plus, the Legal Hub also offers a complete read-only audit trail of all user activity so that all accesses can be tracked and monitored.



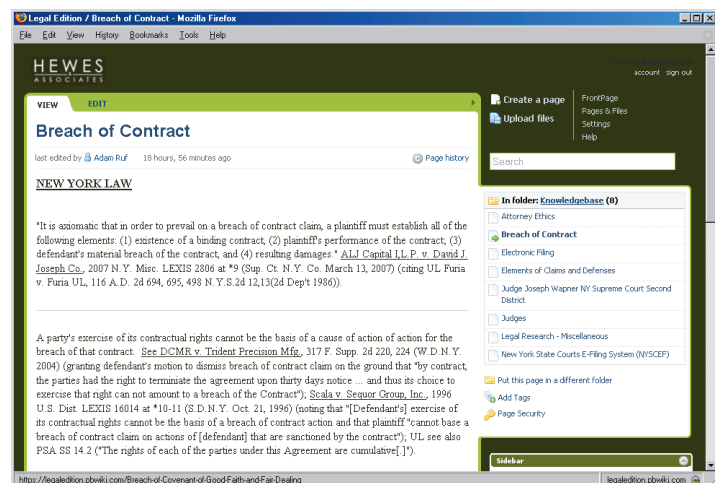
To increase productivity, each PBworks deal room is also completely searchable, including the full text of all uploaded documents. For example, you can search for key terms like "valuation" within uploaded documents.

4. Legal Knowledgebase for Practice Management

- Capture commonly researched legal issues and link to useful citations, cases.
- Share valuable institutional experience, e.g. standard rebuttals, court idiosyncrasies, cases seen by the same judge.
- Build a library of useful contract provisions, clauses, and other components.

PBworks helps partners and senior associates share their expertise with the rest of their teams efficiently. Rather than sending out ad hoc information requests via team- or practice-wide emails, or in hallway conversations, capture, store, and refine the legal expertise of your team. This legal knowledgebase is especially effective for litigators, though it also offers benefits to transactional practices.

Leverage valuable proprietary knowledge of specific judges, arbitrators/mediators, expert witnesses, jurisdictions, and legal issues by capturing it in PBworks. You can collect key citations for legal issues, important jurisdiction information, and other legal knowhow in a searchable repository, so that work on each case doesn't start from scratch each time. Over time, this legal knowledgebase can be a key competitive advantage for your firm.



This kind of shared information resource is especially valuable for multi-office firms. Using PBworks as a firm-wide clearinghouse is a lot easier than searching individual servers (or worse, attorneys' laptops) in the various offices. If you wind up on a case that deals with Japanese contract law, this searchable knowledgebase will help you connect with the right resources within the firm.

PBworks' easy-to-use interface is a snap for your team to use for building a research library, organizing pages with folders and tags, and linking to relevant documents downloaded from external content sources.

Even better, Legal Hub includes Mobile Edition access to your entire knowledgebase (including files) via Blackberry and iPhone. Unlike most document management systems, PBworks lets you search for and read any page or uploaded document.

And because it's easy to organize those documents by topic or matter, you can quickly find every document that's relevant to your current case.

5. Firm-wide Intranet

- Escape personal email archiving and share useful procedures and documents with the whole team
- Streamline staff training and improve quality by capturing institutional knowledge
- Document common procedures such as filing with the state court system
- Record important information such as instructions on using outside legal databases and store it in one shareable central location
- Templatize standard procedures to maximize efficiency and minimize errors

Your attorneys and staff spend hours forwarding and re-sending useful information captured in emails. Keeping useful information locked away in email inboxes means users can only search their archives for the answers to questions they've asked before, and there's no easy way to know if answers captured in old emails are even still correct. When "crunch time" hits, your staff may be too busy answering repetitive questions (e.g. "How to search for documents using Bates numbering?") to answer critical questions.

Instead of relying on tribal knowledge and constant emails and hallway conversations or constantly re-inventing the wheel, use PBworks as an easy-to-use intranet platform to document and share this organizational knowhow. This ranges from company policies and procedures to the specific nuts and bolts of how to file with the New York State Courts E-filing System.

PBworks: Legal-grade Security and Control

Legal Hub comes standard with the features of PBworks' general collaboration suite, including unlimited storage for files and documents, the ability to search the full-text of those documents, and Mobile Edition access via iPhone and Blackberry. But Legal Hub also includes additional features to provide legal-grade security and control.

Like the general collaboration suite, Legal Hub encrypts all communications with the AES/Rijndael-256 algorithm (approved by the NSA for top secret information) and operates out of a locked and guarded datacenter that is under 24/7 video surveillance. PBworks security also includes all of the following

Physical Security

- SAS 70 Type II Audit-certified datacenter
- Dedicated servers
- Redundant power connections with UPS and generator backup
- Multiple redundant network connections
- Physical access to datacenter limited to trusted employees with photo ID

Network Security

- IP Access controls (IP tables)
- Encryption for all administrative traffic (HTTPS, SFTP, SSH)
- IP whitelisting available as an option for business customers

Application Security

- Custom-hardened Unix kernels (Debian Linux, grsec for custom-hardened kernel)
- McAfee HackerSafe continuous monitoring

Policies and Procedures

- Detailed background check
- By policy, employees prohibited from accessing private data
- PBworks claims no ownership of your data
- 24/7 monitoring and escalation
- All users must be verified by email or LDAP authentication

Unlike the general product, Legal Hub includes full encryption of pages and files, even with our datacenter. This ensures the confidentiality of your and your clients' information. The only place your data exists in unencrypted form is on the screen of your authorized users.

In addition to the ability to be notified of, view, tie to particular users, and reverse any edits or changes, Legal Hub also provides complete auditability of workspace access--administrators can review every single access for every page, every file, and every user. Not only does this provide pinpoint precision when it comes to security and compliance, it can also provide valuable information, such as identifying which potential acquirers have visited your deal room most frequently.

The audit log includes an online interface that allows you to filter activity by folder, page, or file, by user, and by IP address:

Audit Log

This week's actions for this wiki are listed below. [Download the complete](#) history in Excel CSV files.

Recent Actions

Action	User	IP Info	Details
▶ View: Intranet FrontPage 10:07 am 16 mins ago	Chris Yeh chris@chrisyeh.com	216.38.134.150 San Mateo, CA Fastmetrics, LLC	–
▶ View: FrontPage 10:07 am 16 mins ago	Chris Yeh chris@chrisyeh.com	216.38.134.150 San Mateo, CA Fastmetrics, LLC	–
▶ Return visit 10:07 am 16 mins ago	Chris Yeh chris@chrisyeh.com	216.38.134.150 San Mateo, CA Fastmetrics, LLC	Interval: 1 day, 21 hours Last_visit: 1239220644
▶ Login 10:02 am 22 mins ago	Chris Yeh chris@chrisyeh.com	216.38.134.150 San Mateo, CA Fastmetrics, LLC	–
▶ View: FrontPage 9:53 am 31 mins ago	Mark mark@pbwiki.com	216.38.134.150 San Mateo, CA Fastmetrics, LLC	–
▶ Del: FrontPage.1239381966 9:53 am 31 mins ago	Mark mark@pbwiki.com	216.38.134.150 San Mateo, CA Fastmetrics, LLC	–

You can narrow the parameters simply by clicking on the underlined items, down to the level of a single user/page/and IP address:

Audit Log

This week's actions for this wiki are listed below. [Download the complete](#) history in Excel CSV files.

Recent Actions

Filters: [User = Chris Yeh](#) [IP Address = 216.38.134.150](#) [Object name = FrontPage](#)

Action	User	IP Info	Details
▶ View: FrontPage 10:07 am 21 mins ago	Chris Yeh chris@chrisyeh.com	216.38.134.150 San Mateo, CA Fastmetrics, LLC	–

Finally, you can download the data as a CSV file for detailed analysis in your database or statistical package of choice.

PBworks: The Proven Collaboration Solution

As one of the leaders in the general online collaboration market, PBworks offers a proven solution that the world's largest law firms rely on.

The solution we deliver is fast and easy to use; PBworks hosts over 900,000 workspaces, and its industry-leading ease of use has been proven everywhere from elementary school classrooms to Fortune 500 boardrooms.

Our operations are reliable and trusted. PBworks offers a 99.9% uptime SLA, with no scheduled downtime. Customer support is available 24/7/365. Our experienced team can help you get started right away with best practices, legal templates, and a customized workspace for your firm's particular needs.

About PBworks

PBworks (<http://pbworks.com>) is the world's leading provider of hosted collaboration solutions for businesses and education. Leading companies and organizations like FedEx, Landor Associates, and the FDA choose PBworks to help teams work more effectively across geographic and organizational boundaries, including teams that span employees, customers, partners, and vendors.

Over 85,000 businesses have chosen PBworks to share knowledge, interact with customers, manage projects, and support other forms of teamwork. We host over a million team workspaces, serve several million users each month, and 96% of users would recommend PBworks to a friend. Investors in PBworks include Mohr Davidow Ventures, Seraph Group, Sippl Investments, and Ron Conway.

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