

Texas Law Firm Takes Hybrid Cloud Approach to eDiscovery Solutions and Services

As average cases at Bourland, Wall & Wenzel, P.C. usually involve no more than 2,000 documents, the firm's 2-person IT staff preferred to manage eDiscovery solutions in-house. When an increasing amount of document production suddenly included a case exceeding 700,000 documents, they realized it was too much for even their newly upgraded network to handle. Their search for another option to manage information in large cases led them back to IPRO.

The 28-attorney, Fort Worth, Texas-based firm migrated to IPRO Discovery][Local to maintain the majority of cases on-premise, but also began using IPRO Services to manage the new sizable case. As IPRO Services uses Discovery][Enterprise in a cloud environment, the hybrid approach eliminates the burden of storing large case data locally, provides its attorneys and support staff with case management services, and enables easy information sharing for multi-party collaboration, improving customer service and reducing costs.

Long-Standing Relationship

Bourland, Wall & Wenzel, P.C.'s attorneys and IT staff have used various IPRO solutions since 2013, but as their litigation practice began to grow, the firm realized they needed more out of the legacy solutions. So, they worked with IPRO to upgrade their deployment. All cases were migrated to the new hardware/software platform and the firm then engaged the IPRO training staff to teach legal assistants how to use the new solution. When the new **IPRO Discovery][Local** went live in 2021, the firm experienced increased processing speeds, expanded data storage space, and more user participation.

The addition of **IPRO CaseStory** and **TrialDirector** complimented their installation, giving staff more tools to assist clients at trial. They also added access to IPRO cloud services for large case hosting. "We didn't have a lot of problems transitioning," said Alex Zielinski, IT Manager. "I can't think of a time when we have had to rerun a production set because of program errors. IPRO is the best product we've used."

Finding the Threshold for Cloud Services

With the assistance of **IPRO Enterprise** hosting for large, multi-party cases Bourland, Wall & Wenzel, P.C. legal assistants now can upload raw client data, or incoming processed discovery into the cloud for IPRO Services to load into cases. Enterprise hosting can even pre-tag documents uploaded to the database. "In some ways it's easier than the desktop version because you don't have to do as much, said Emily Baker, Legal Assistant. "We've had some large ZIP files and it was very quick to upload them, and my part was only 2 minutes of that."

The hybrid local + cloud approach with IPRO is working so well that the firm is now trying to determine how to expand it to all litigation cases and even other practice areas. They encourage attorneys to alert IT early as to the scope for incoming cases so they can prepare the proper solution and be ready to load files upon receipt. It is encouraging to know that "...if a locally hosted case suddenly increases exponentially, it's easy to transfer it to the cloud services solution." said Zielinski.

Cost-Effective Cloud Services

Bourland, Wall & Wenzel, P.C. has used other hosting and processing services for some larger cases in the past. When the vendor in its latest large case increased hosting charges and planned to charge the firm a hefty ingestion fee for adding documents to its cloud-hosted platform, a second opinion was warranted. The firm was surprised to discover that hosting the same data with IPRO services was more cost-effective.

The cloud solution also enables Bourland, Wall & Wenzel, P.C. to offer co-counsel or clients a login to view the data, which is more time and cost effective than previous data sharing methods of putting data on a hard drive to be delivered to clients. The firm plans to transfer other hosted cases to IPRO in the future if they don't close in a timely manner. "Clients and co-counsel like that instant gratification of being able to see data right now and not having to download the information from Dropbox or wait for a courier," said Baker.

"We like the flexibility of saying it's all in IPRO and not having to tell clients we have a limit to the amount of data we can host. It is all built into the discovery process now. If we have a case that we know is going to hit a certain level storage or collaboration, we just move it to Enterprise. It has freed up IT and legal assistants' time and made the attorneys' jobs easier."

Alex Zielinski, IT Manager



Bourland, Wall & Wenzel, P.C. Transitions Large Cases to Cloud

1. Flexibility. The firm now uses an eDiscovery ecosystem of hybrid solutions from IPRO that allow it to access a cloud platform to host and process data for large cases but handle smaller ones in house.

2. No Workflow Changes. Attorneys decide early if a case is going to be managed in the cloud or locally, and while there are some minor differences between the interfaces of the two platforms, they are glad that they can access the documents whenever needed.

3. Cost and Time Savings. The firm can more effectively and efficiently manage eDiscovery processes no matter if the case requires a large number of documents and multiple attorneys who must have access to the information.

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