

Dashboard Legal

vs

Project Management Tools



Introduction



General purpose project management tools have dozens of features, wikis, bots and buttons etc. that requires a tremendous amount of configuration and setup. These tools were designed to be used by anyone in any profession. And to be effective, they require adoption by an entire organization.

Dashboard Legal is simple. And every single feature is included for one reason: *to facilitate better legal work.* We don't shy away from the fact that DBL does less than market solutions – we're proud of it.

Dashboard Legal is valuable as much for what it is, as what it is not.



Project Management Solutions

Comparison:



	Dashboard Legal	Microsoft Teams	asana	monday	HighQ
Built for Lawyers	✓	✗	✗	✗	✓
DMS Integration	✓	✗	✗	✗	✓
Modern UI/UX	✓	✓	✓	✓	✗
Resource Management	✓	✗	✗	✗	✗
Implementation Program	✓	✗	✗	✗	✗

Structure & Purpose

Meant for Lawyers



Dashboard
Legal

Simple, pleasant UI/UX to facilitate legal work.

Instant context – Click into a dashboard, instantly access relevant emails, docs, chat and checklist all in the same view.

Includes:

- Boards View – visualization of all clients & matters
- Tasks View – aggregate tasks across checklists for the individual
- Resource Management View – a view for partners to see who's doing what
- Optional email integration

Meant for everyone else



Intended for 250+ million existing Microsoft customers.

Designed for video and chat.

Focused on collaboration channels, and being everything to everyone.



Designed to manage project schedules and tasks, with no DMS or email integration.

Requires configuration, individual setup, mass adoption by organizations along with steep learning curves.

Does NOT include:

- Native DMS or email integrations
- Visualization of Matters or Tasks in aggregated way
- Resource Management view

How It's Built

Built for Lawyers



Dashboard
Legal

Streamlined functionality, only includes what lawyers need to get the job done.

Purpose-built with client matter taxonomy at its center. Creates delineation of materials organized in clientboards & matter boards, so lawyers know where conversations are supposed to happen and the work stays organized.

Modern tools that enhance the current workflow, like templated Checklists — fully exportable to pdf or word (to create the exact same work product)

Built for everyone else



Engineered for real-time threaded conversations, replacing the inbox.

Chaotic: Overlapping conversations get crowded as threads are added ad-hoc and there's no clear delineation of where work is supposed to happen. No DMS integration.

Worse than email when it comes to search by keyword or topic.



Cluttered with dozens of irrelevant features, buttons and bulk.

Setup/Configuration Requires intensive work to set up and configure workspaces to make sense for lawyers and legal work. No DMS integration, no legal templates, no legal taxonomy or nomenclature.

How It's Used

Used by Lawyers



Dashboard
Legal

Starts as an upgrade to task management and current check-listing process, additional benefits accumulate over time.

Lawyers can work from the familiarity of their Inbox, while taking advantage of modern collaboration solutions:

creates simplicity.

Can be used by individuals, doesn't require group adoption.

Used by everyone else



Behaves like a corporate chat room. Heavily focused on video conferencing and channels.



Lawyers have resisted project management tools in Teams (Planner, Project etc.) because it forces them to leave their Inbox and work somewhere else: **adds complexity.**

Mass adoption by organization required to be effective.

Time To Value

Seamless for Lawyers



Dashboard
Legal

Battle tested implementation program gets lawyers to use and love Dashboard Legal. *We're with you every step of the way.*

iManage documents in the same place as new project management tools: **increases adoption.**

Can be used by a few team members

vs. requiring the whole team to adopt to be effective.

Lawyers won't leave Outlook and iManage *so don't make them.*

Internal only *vs. the hairy process of including outside parties in workspaces.*

Not seamless for anyone



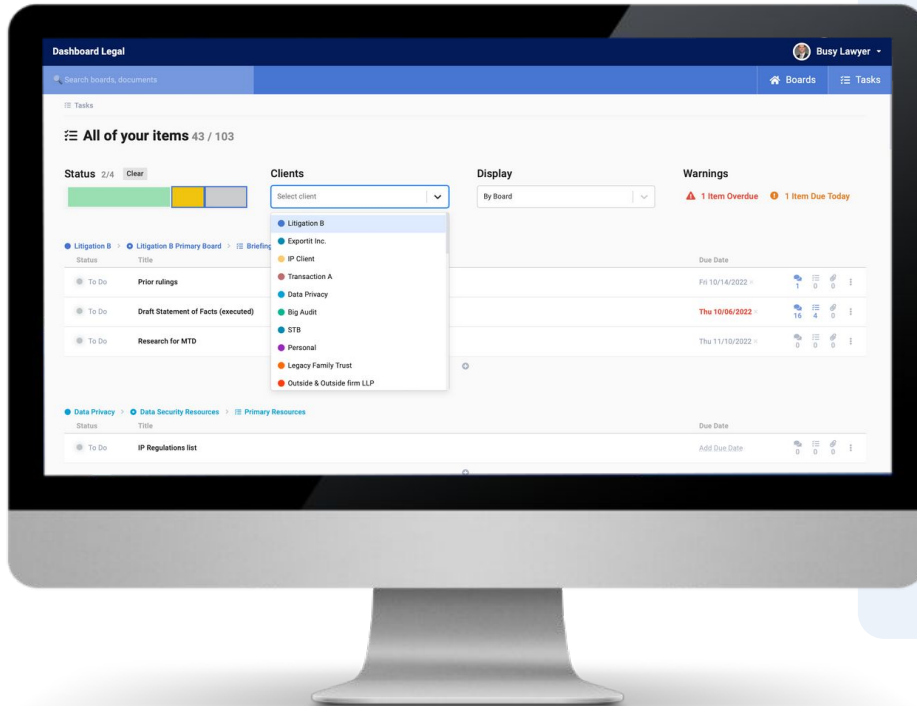
No integration or onboarding. Users have to figure it out on their own.

Every company, even teams within companies, use the tools differently. Leads to confusion and disjointed workflow.

Lawyers are hesitant to leave their Inbox, or use project management tools in general: **proof is in the pudding.**

Use Case Scenario: Tracking Deadlines & Responsibilities

A group wants to collaborate on **Matter A**, track deadlines and turns of documents, track internal responsibilities, and work efficiently in a remote setting.



Group using Dashboard Legal needs:

A Dashboard Legal workspace for Matter A.

It contains sorted emails, discussion channel, flexible checklist, and documents integrated from iManage. The work has a place and whole team knows where to do it.

Group NOT using Dashboard Legal needs:

Outlook (endless email chains) +
MS Teams (for chat) +
MS Words Checklists (running red lines to show changes and updates) + iManage.

Use Case Scenario: Getting up to speed

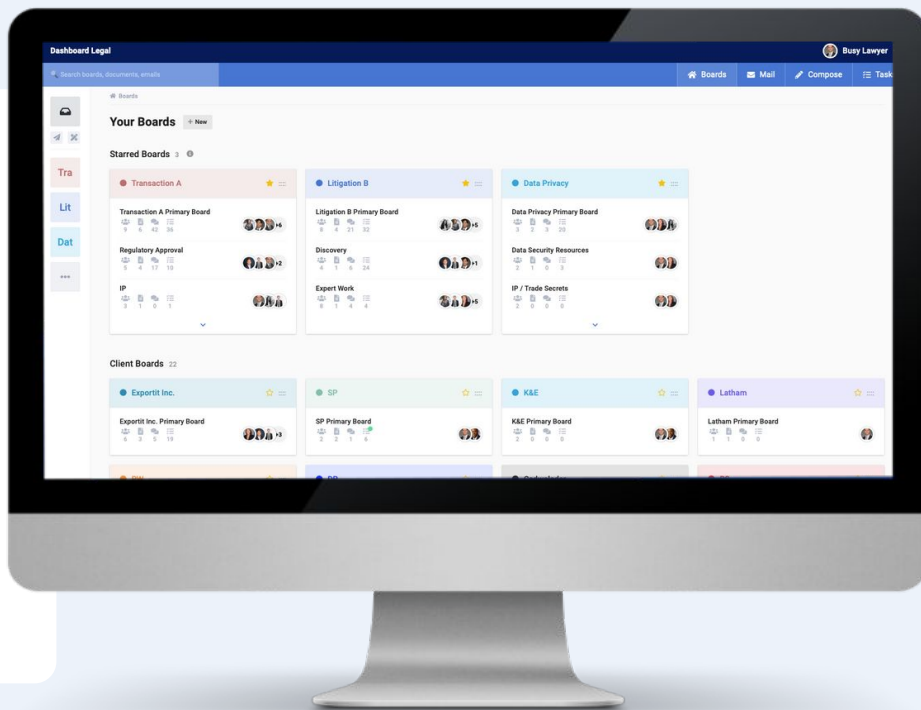
An individual lawyer is working on a matter for Client A, and Client B calls. How does she get up to speed?

Group using Dashboard Legal needs:

Open Dashboard Legal and click into Client B Dashboard.

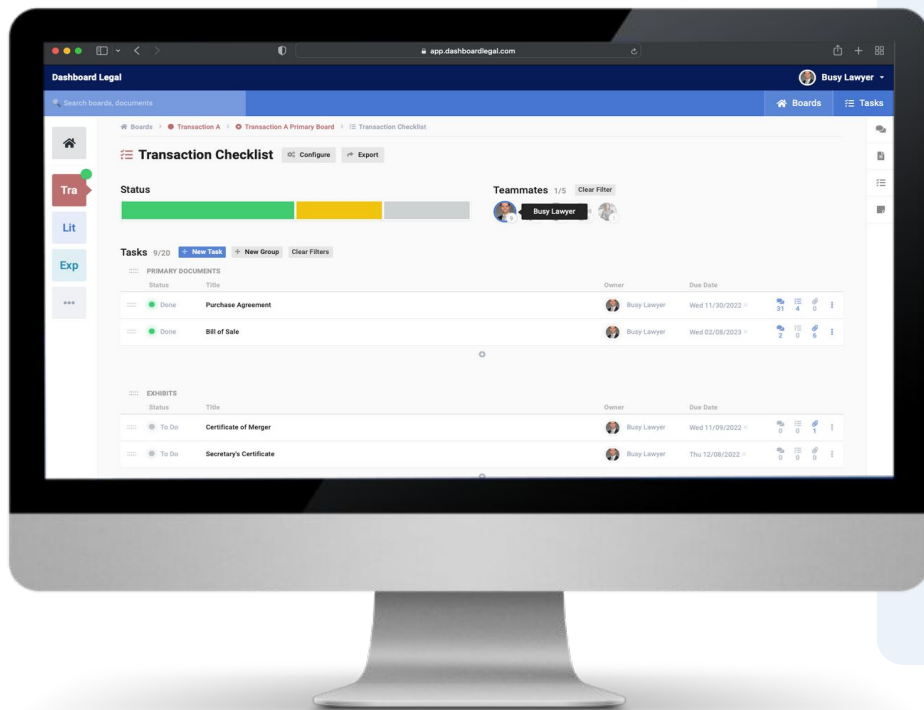
Group NOT using Dashboard Legal needs:

Search Outlook for relevant emails + Search MS teams for relevant conversation threads + Refer to MS word checklist + Open iManage and search for docs + email colleagues for updated info



Use Case Scenario: New Team Member

A new attorney joins the Client C team.
How does he integrate with the group
and understand the workflows?



Group using Dashboard Legal needs:

Open Dashboard Legal and click into
Client C Dashboard for immediate context.

Track through the discussion channels,
review the checklist updates, access the relevant
documents, all in a single organized workspace

Group NOT using Dashboard Legal needs:

Team members forward email chains to new attorney
and new attorney reviews email chains, iManage
folders, checklists, redlines and other materials to get
up to speed. He has little context for the matter, just
gets started.

Thanks!

