

Velosio[®]



CLIENT SOLUTION CASE STUDY

**IMS Creates
User-Friendly,
Interactive, Intuitive
Client Experience
with Power Platform**

 **IMS**
LEGAL STRATEGIES

Overview



Software Solutions:

- Power Apps
- Power Automate
- Power Pages
- Power BI
- Dataverse
- Microsoft Fabric
- Dynamics 365 Customer Voice

Challenges:

- Manual Processes
- Disconnected Systems
- Insight Constraints

Benefits:

- User-friendly, intuitive, and interactive app
- Competitive advantage
- Ability to conduct business remotely or in person

Company Overview:

IMS Legal Strategies helps the world's most formidable lawyers achieve optimal outcomes through best-in-class expert witnesses, litigation consulting, visual advocacy, and presentation technology for on-site and online proceedings.

Industry: Legal Consulting

Employees: 340+

Headquarters: Pensacola, FL

Annual Revenue: \$100M

Background

IMS Legal Strategies is a professional services firm that partners with law firms and corporations around the globe to elevate their legal strategies. Through every stage of dispute resolution, IMS provides a full suite of sophisticated advisory services lawyers need to prevail – world-class expert witness placement, cutting-edge visual advocacy, flawless presentation delivery using state-of-the-art technology, and specialized consulting. Whether identifying expert witnesses from any industry and discipline, developing themes and exhibits, preparing witnesses for hearings and cross-examinations, or conducting focus groups and mock arbitrations, IMS works collaboratively with its law firm partners to strengthen their cases.

In 2018, Tsongas Litigation Consulting (now part of IMS), knew that it needed to add efficiencies and automate its largely manual, paper-driven process for mock trials and focus groups. For each mock trial/focus group, Tsongas consultants had huge stacks of paper that were packed into a carry-on they dubbed “the baby.” “It was the last thing you would ever want to lose or forget, like a baby,” laughs Rebecca P., IMS Consulting Services Initiatives Lead. Clients and consultants would dig through the stacks of paper, trying to understand the responses and making tallies, and then create

PowerPoints to share highlights of the mock trial or focus group – but the Tsongas team knew there was much more that could be gleaned from the data.

Tsongas considered online survey programs like SurveyMonkey and Qualtrics, as well as Microsoft Forms (now Microsoft Dynamics 365 Customer Voice). Based in Seattle, they set up an appointment with a business leader in a nearby Microsoft store to learn more about Forms. “Microsoft Forms was close to what we were looking for in how it could visualize data, but we knew we wanted more tools for analysis.” Microsoft referred Tsongas to developer partners who could customize applications, and after meeting with several, Tsongas ended up choosing Velosio. “We selected Velosio as our partner because they provided the most straightforward proposal. With Velosio, there was an associated ‘all up’ cost, with a specified solution and deliverables. We also knew exactly who would be working on the project, and we felt like Velosio presented more of a customer service-oriented culture. The other partners didn’t provide a total estimate, and it didn’t sound like the people we were speaking with would be the developers actually working on the project.”



Solution

Velosio’s solution consisted of Power Apps, Power BI, and Microsoft Dynamics 365 Customer Voice to take jury research to the cloud with a dynamic application, named “The Advantage™.” It gave Tsongas the ability to help clients visualize mock jury data in a powerful new way, quickly assessing the strength of case themes, evidence, and witnesses with Power BI dashboards. The Advantage™ provides immediate access to participants and participant feedback during mock trials, focus groups, mock arbitrations, and other research models. This innovative platform is tailored to specific cases and enables clients and their jury consulting team to design, test, and refine trial strategies on the fly. Based on live juror feedback, the legal team can pivot their questioning and strategy for a more interactive experience.

“We initially started working with Velosio in 2019 to establish the client journey. That’s one of the things that I appreciate to this day – every person I’ve had the opportunity to work with at Velosio wants to understand the client journey so they can identify a more effective solution for us at every turn. They form a bridge between trying to understand what we want and how to make the solution happen with their expertise. And oftentimes, they deliver something better than we envisioned, with greater efficiencies and more unique ways to display the information. I appreciate that.”



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Rebecca P., IMS Consulting Services Initiatives Lead

Making the Most of COVID-19

Tsongas and Velosio worked on building The Advantage™ solution shortly before COVID-19 began. Tsongas doubled down on its investment in the project so that it could continue mock trials and focus groups online when in-person trials were no longer an option. “COVID-19 required an online solution and making investments in The Advantage™ greatly contributed to our success through the pandemic. We were able to pivot to online much more quickly than our competitors and with a better client experience.”

In fact, The Advantage™ was a strong competitive advantage for Tsongas and, in part, why they became attractive to a bigger firm, IMS Legal Strategies. “IMS is a much larger organization with more litigation consulting services offerings. They wanted to lean in and expand the capability unique to The Advantage™.”

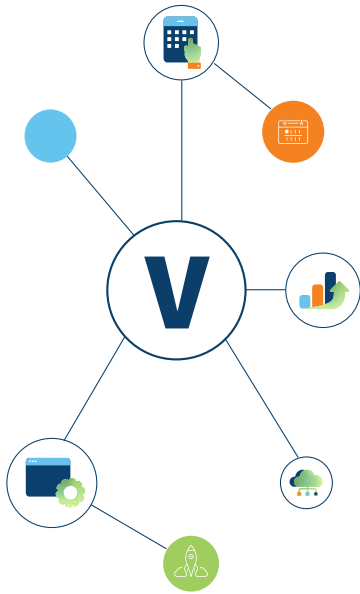
The Advantage™ 2.0

The newly merged Tsongas and IMS teams began working with Velosio on The Advantage™ 2.0 to incorporate IMS' expanded service offerings. Enhancements included developing a client portal using Microsoft Power Pages. This gives clients unique access to data where they can interact, drill down, and filter it

in unique ways. For example, they can now see how a witness performed in the mock trial based on juror feedback and learn how they stack up against all other historical witness data. They may be likable in this trial but in comparison to historical data, they are extremely likable.

The Advantage™ 2.0 also incorporates Microsoft Fabric to handle the data traffic and to make the data management process more efficient and consistent. "Clients can observe in-person or online mock trials remotely and view data as it's coming in, no matter where the client is located."

Training for The Advantage™ 2.0 incorporated change management to teach users about the fundamental changes in the workflow and online client portal delivery. "The big win in terms of training and change management was that our consultants could experience the 'wow factor' with their clients – they could see how The Advantage™ separates us from the competition."



System Benefits

IMS Legal Strategies now provides a more seamless experience for its clients. The online solution allows for flexibility. "We can make changes to the survey design, questions, and more, up to the day of the project and during the project; this was impossible in the past when we printed everything." The Advantage™ has been a competitive game changer for IMS and offers many benefits to clients:

- User-friendly, interactive, and intuitive
- Highly effective formats for consuming and analyzing juror data
- Deeper understanding of data through the life of a case
- Evaluation and comparison of witness credibility
- At-a-glance view of mock juror damage awards
- All matters and research data in one place

"We will continue to invest in technology enablement - it's critical in this day and age," says Rebecca P. "In the four and a half years we've been working with Velosio, it has been a fun journey and a great partnership for our unique solution and niche."

THE ADVANTAGE™

An Interactive Juror Insights Application



Delivering instant feedback and meaningful findings.

With our dynamic application, The Advantage™, you can visualize your mock jury data in a powerful new way and quickly assess the strength of your case themes, evidence, and witnesses.

The Advantage™ provides immediate access to participant feedback during mock trials, focus groups, mock arbitrations, and other research models. This innovative platform is tailored to your case and enables you and your IMS jury consulting team to design, test, and refine your trial strategy.

Partner with our jury research experts to maximize the value of your mock trial experience and gain a competitive advantage.

Contact us to get started.

The Advantage™ Difference

- User-friendly, interactive, and intuitive
- Control over research results and data visualizations
- Highly effective formats for consuming and analyzing juror data
- Deeper understanding of data through the life of your case
- Insights into high-risk juror characteristics
- Evaluation and comparison of witness credibility
- At-a-glance view of mock juror damage awards
- All of your matters and research data in one place



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IMS markets The Advantage™ to its client base as a unique competitive solution.

*All quotes attributed to Rebecca P., Consulting Services Initiatives Lead, IMS Legal Strategies



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