

# “Who Uses What” Survey Results

Sponsored by the Tools & Technology Interest Group

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## Introduction

In early 2018, a survey was distributed by the Tools & Technology Interest Group intended to provide a reference guide for the technology solutions currently being used by ACC Legal Operations members to support their legal function. The survey covered 22 different solution areas.

The solution areas included in the survey results are:

- Business Intelligence
- Contract Management
- Corporate Secretary
- Document Comparison
- Document Management
- eBilling
- Legal Hold
- eDiscovery
  - Identification / Preservation / Collection
  - Processing / Analysis
  - Review / Production
- eSignature
- Integration
- IP Management
- Matter Management
- Records Management
  - Retention Schedules
  - Tracking Records / Boxes
  - Enforce / Map Retention Period
- Workflow
- Legal Research Services
- Online Virtual Data Room
- Board Portals
- Compliance Office

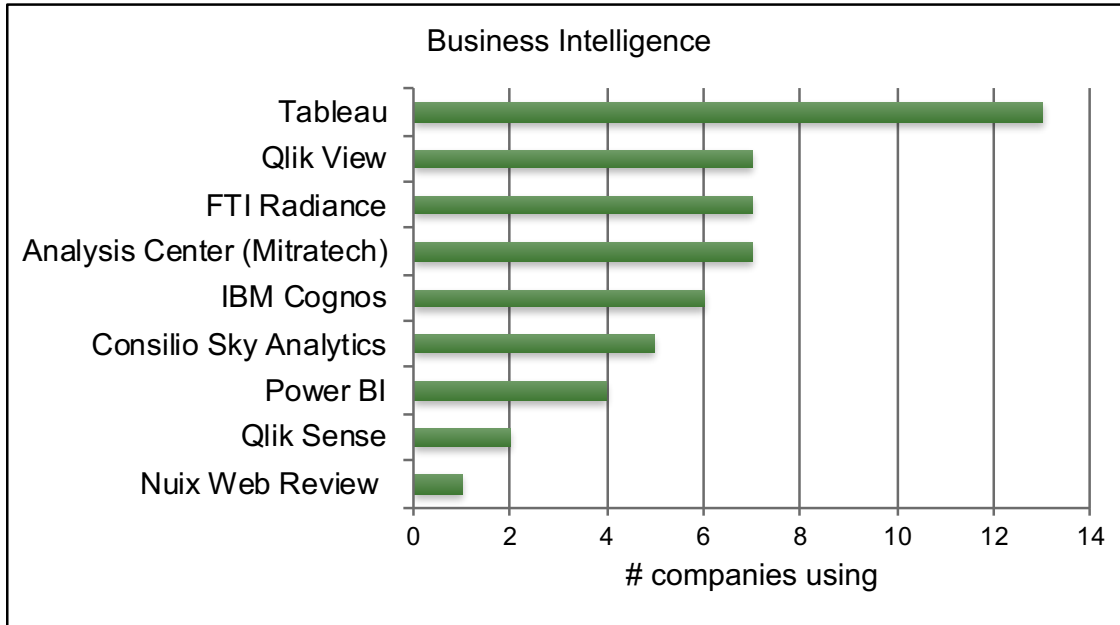
The primary goal of the survey is to provide contact information for those respondents who are willing to discuss their legal technology solutions with other ACC Legal Operations members. In conjunction with the Tools & Technology Vendor List, these resources will provide valuable sources of information to help you make key technology-related decisions to better serve your legal teams.

Thanks to all who responded to the survey...we hope it will be helpful to all!

The ACC Legal Operations Tools & Technology Interest Group

## Business Intelligence Software

Business intelligence software is what you use to gather and analyze data about your legal functions. Examples of data that can be analyzed includes legal spend, legal case data allows, and eDiscovery metrics. It typically provides dashboard or report creation, or other methods to represent data in various formats.



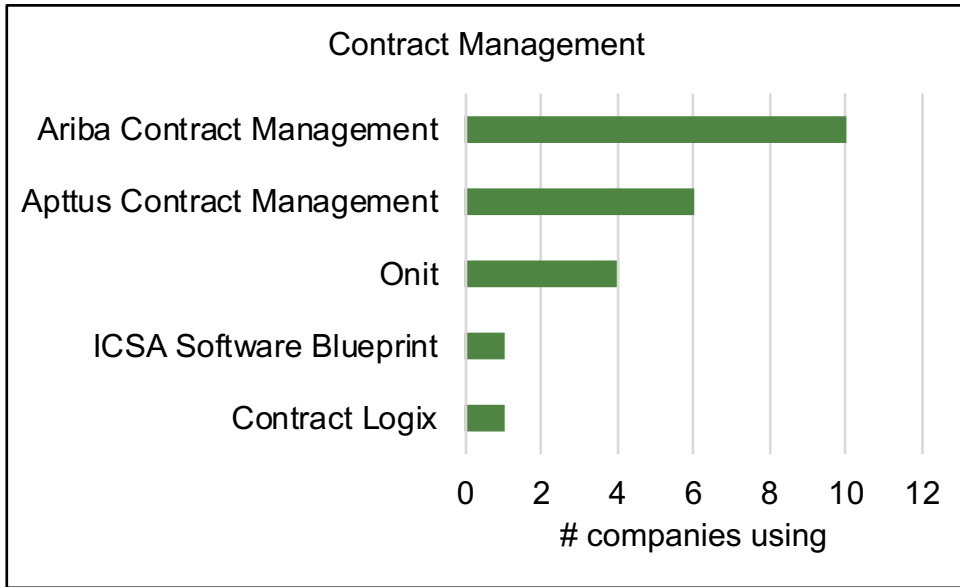
## Who Uses What

Analysis Center (Mitratesh)	Consilio Sky Analytics	IBM Cognos	Nux Web Review & Analytics	Power BI	Qlik Sense	Qlik View	Tableau
Abbott	AEP	AIG	Abbott	AECOM	AIG	AIG	Caterpillar
CDW	Caterpillar	Jackson		Caterpillar	Abbott	Fox	Dell
Flagstar	Flagstar	PPG		Prudential		Ingram Micro	Husqvarna
Mattel		Prudential				PPG	Ingersoll Rand
Reckitt Benckiser						Shire	Jackson
Unisys						Unum	Mondelez
							Nike
							Purdue
							TE

Other tool(s)	Who is using them
Business Objects	Prudential
CounselCommand (HBR)	Prudential; Oracle
Crystal Reports	Caterpillar
SQL Server Reporting Services	Williams
Sybase IQ	Jackson
TyMetrix	Chubb

## Contract Management Tools

Contract management tools are used to support contract lifecycle management including requesting, authoring, negotiating, approving, signing, analyzing and storing contracts.



### Who Uses What

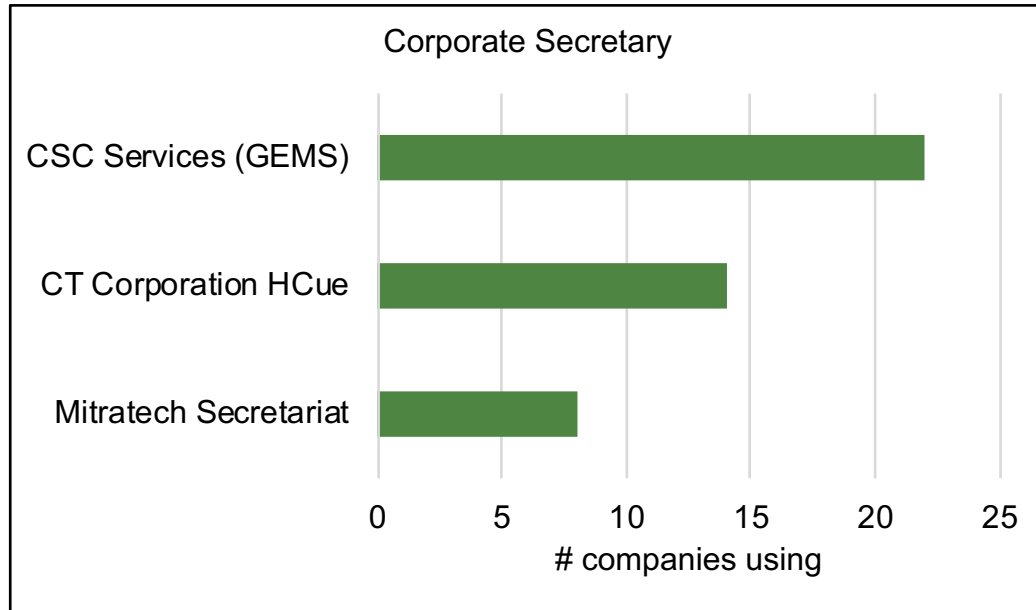
Aptus Contract Management	Ariba Contract Management	ICSA Software Blueprint	Onit
Abbott	Dell	AIG	Caterpillar
Nike	AIG		Chubb
Prudential	Campbell Soup		Mattel
	Caterpillar		
	CHS		
	Purdue		

Other tool(s)	Who is using them
Aptus	Prudential
Ariba (SAP)	CHS

Other tool(s)	Who is using them
Axicos (of Switzerland)	CSL Behring
Axiom/IRIS	Dell
Axxerion	Shire
Beams Platform (CM	Yazaki
Conga (Novatus)	Husqvarna; Procore
Contract Insight	Lonza
DocuSign	Intelligent Medical
Ironclad	Procore
Laserfiche (self-designed)	Intelligent Medical
Rights Logic	Mattel
SalesForce (CMS customized)	Daimler
Selectica	Unisys
ServiceNow	Chubb
TeamConnect	Reckitt Benckiser
Zycus	TE

## Corporate Secretary Tools

Corporate secretary tools are used to manage board governance cycles including online board books, event scheduling, collaboration and reporting.



### Who Uses What

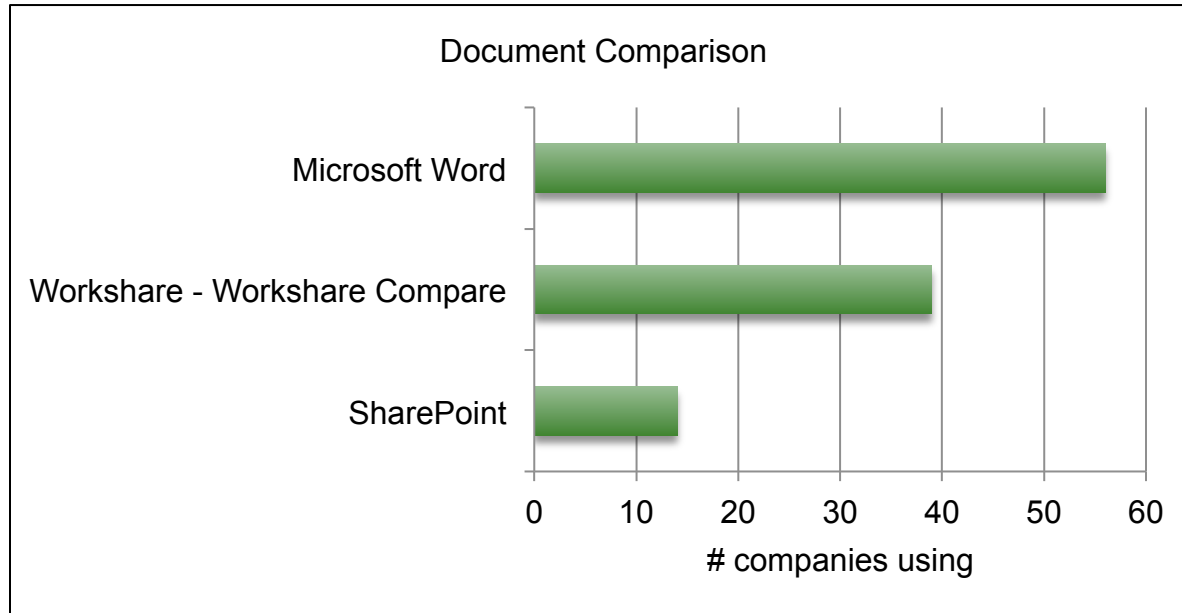
CSC Services - GEMS	CT Corporation HCue	Mitrtech Secretariat
Abbott	AECOM	Caterpillar
CHS	AEP	CDW
Flagstar Bank	Chubb	Mutual of Omaha
Ingersoll Rand	Daimler	Reckitt Benckiser
Ingram Micro	Shire	Sun Life
PPG		Williams
Prudential		
Purdue		
Reckitt Benckiser		
TransCanada		



Other tool(s)	Who is using them
Blue Print	CSL Behring; Dell; Mondelez
Boardvantage	Nike; Walgreens
Cogency	Husqvarna
ComputerShare GEMS	TE
Diligent Boards	Blackbaud; Sun Life
Global Entity Management System	Lonza
QDiligence	Nike

## Document Comparison Tools

Document comparison tools are used to identify changes between two versions of the same document for the purposes of document editing and review.



### Who Uses What

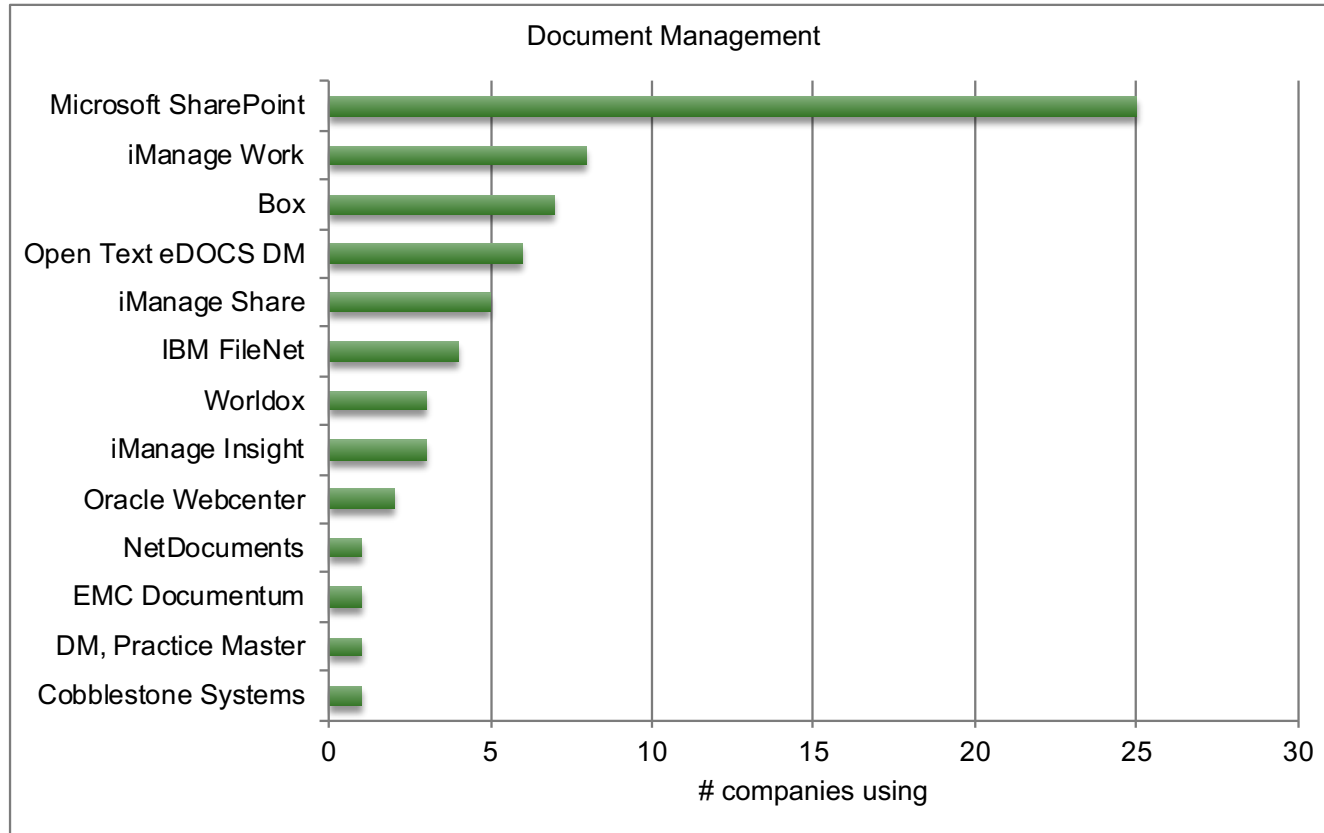
Microsoft Word	SharePoint	Workshare - Workshare Compare
AECOM	AECOM	Abbott
AIG	AIG	AEP
CDW	Jackson	Campbell Soup
CHS	Prudential	Caterpillar
Chubb	Reckitt Benckiser	CSL Behring
CSL Behring	TE	Dell
Daimler	Unum	Flagstar
Dell		Fox
Flagstar		Mattel
Hasbro		Mutual of Omaha

Microsoft Word	SharePoint	Workshare - Workshare Compare
Husqvarna		PPG
Ingersoll Rand		Prudential
Ingram Micro		Shire
Intelligent Medical		Sun Life
Jackson		TE
Lonza		TransCanada
Mattel		Unisys
Mondelez		Unum
Nike		Walgreens
Oracle		Williams
Procore		
Prudential		
Purdue		
Reckitt Benckiser		
Shire		
TE		
Unum		
Yazaki		

Other tool(s)	Who is using them
Adsensa	Chubb
Ironclad	Procore
Laserfiche	Intelligent Medical

## Document Management Tools

Document Management tools are used to track, manage and store digital documents and email and reduce paper.



## Who Uses What

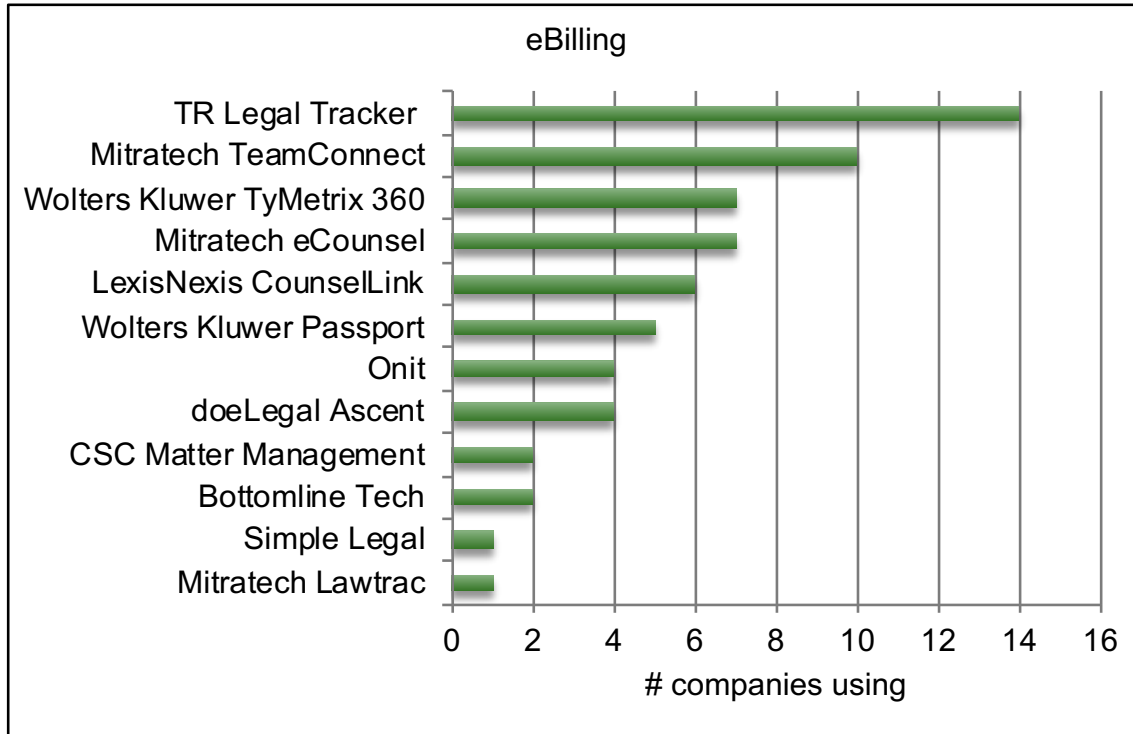
Box	Cobblestone Systems	IBM FileNet	iManage Insight	iManage Share	iManage Work	MS SharePoint	Open Text eDOCS DM	Oracle Webcenter
AECOM	Lonza	Flagstar	Campbell Soup	AEP	Abbott	Abbott	Fox	Dell
Caterpillar			Caterpillar	Campbell Soup	AEP	AECOM	Mutual of Omaha	Oracle
Fox			Mondelez	Mattel	Campbell Soup	AIG	Unum	
Nike				Prudential	Mattel	CHS		
Unum				Shire	Prudential	Chubb		

Box	Cobblestone Systems	IBM FileNet	iManage Insight	iManage Share	iManage Work	MS SharePoint	Open Text eDOCS DM	Oracle Webcenter
					TransCanada	Ingersoll Rand		
						Ingram Micro		
						Jackson		
						Nike		
						Prudential		
						Purdue		
						Shire		
						TE		
						Unisys		
						Unum		
						Williams		

Other tool(s)	Who is using them
Enterprise Connect;	Nike
Google Drive	Procore
Laserfiche	Intelligent Medical
Proprietary System for WORM	Jackson
Quip	Fox
Salesforce	Procore
TeamConnect	Ingersoll Rand; Reckitt Benckiser
Worldox	Husqvarna; TE

## eBilling Tools

eBilling tools are used to submit invoices from outside counsel or external entities over the internet to organizations and support the processing of invoice payments electronically.



## Who Uses What

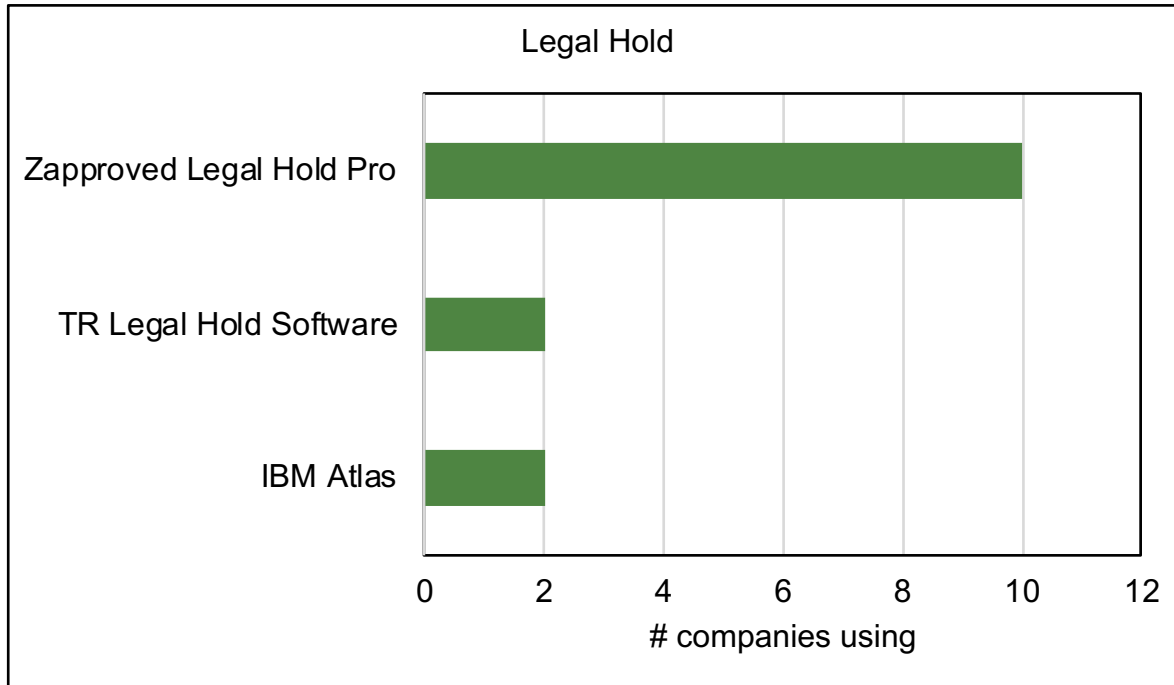
Bottom-line Tech.	CSC Matter Management	doeLegal Ascent	Miratech e-Counsel	Miratech Lawtrac	Miratech TeamConnect	Onit	TR Legal Tracker	Wolters Kluwer Passport	Wolters Kluwer TyMetrix 360
Williams	Ingram Micro	TransCanada	Abbott	Ingersoll Rand	AEP	AIG	AECOM	Walgreens	CHS
	PPG	Yazaki	CDW		AIG		Husqvarna		Chubb
			Flagstar		Campbell Soup		Jackson		Dell
			Mattel		Daimler		Nike		Lonza
			Unisys		Ingersoll Rand		Oracle		TE

Bottom-line Tech.	CSC Matter Management	doeLegal Ascent	Mitratech e-Counsel	Mitratech Lawtrac	Mitratech TeamConnect	Onit	TR Legal Tracker	Wolters Kluwer Passport	Wolters Kluwer TyMetrix 360
					Prudential		Unum		
					Purdue				
					Shire				

Other tool(s)	Who is using them
AIMS	Caterpillar
Corridor	Mondelez
eCounsel	Caterpillar
Law Manager	Mondelez
SAP MyBuy Module	Reckitt Benckiser

## Legal Hold Tools

Legal Hold tools are used to automate and manage the entire process of legal hold notifications, tracking responses, interviews, reminders, and escalations.



### Who Uses What

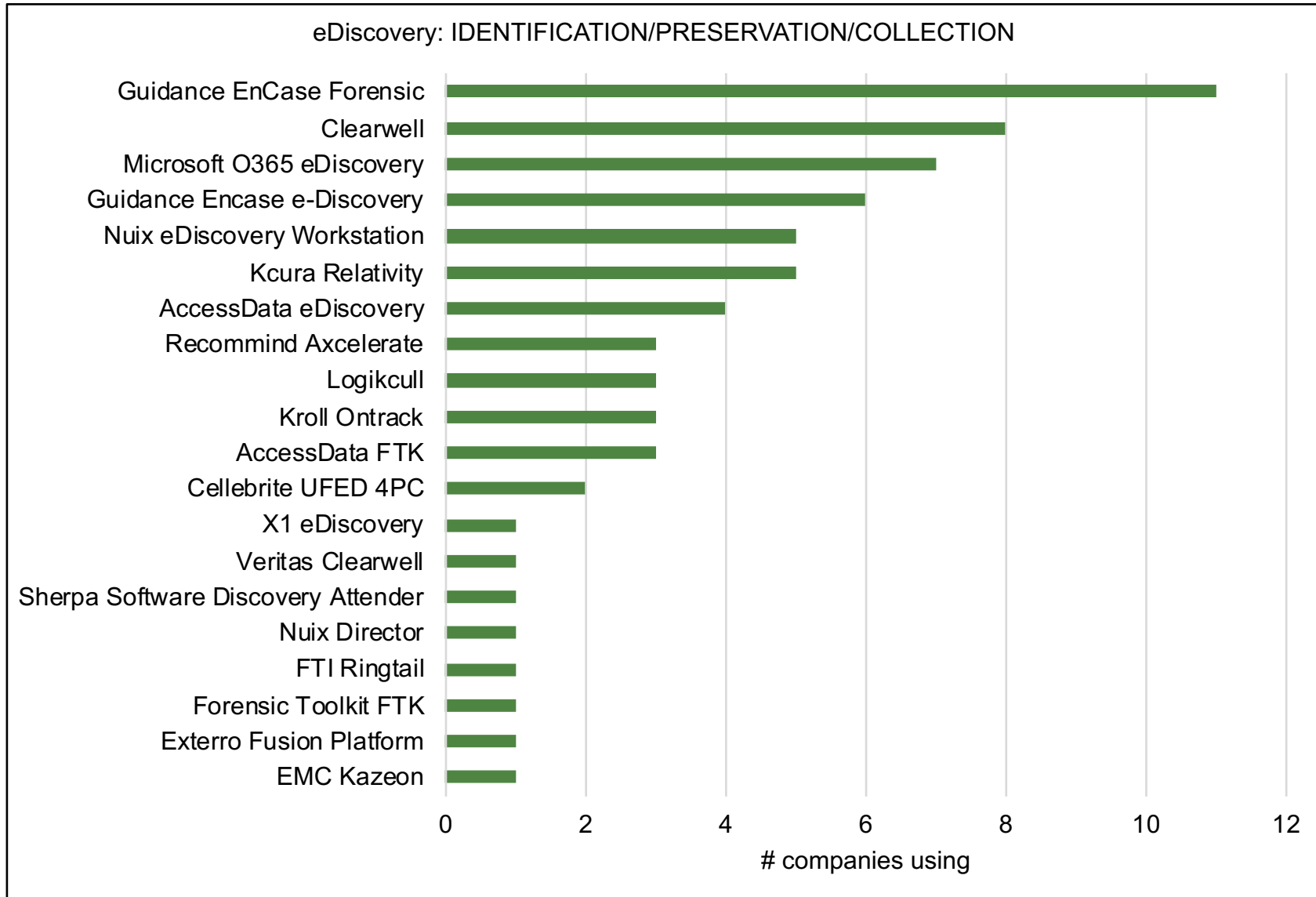
IBM Atlas	TR Legal Hold Software	Zapproved Legal Hold Pro
Unum	AECOM	Abbott
Williams		Campbell Soup
		Chubb
		Daimler
		Husqvarna
		Mondelez
		Shire
		TransCanada



Other tool(s)	Who is using them
AccessData	Ingersoll Rand
Compliance Data Solutions	CHS
Exterro (Fusion)	Nike; Oracle
Guidance EnCase eDiscovery Legal Hold Tool	Walgreens
Internally Developed System	Mutual of Omaha; Prudential
Jordan Lawrence (Document Retention)	CDW; Intelligent Medical
Relativity Legal Hold Application	TE
TeamConnect	AEP
Veritas/Clearwell	Flagstar

## eDiscovery: Identification/Preservation/Collection

These are the variety of tools used to identify, preserve, collect, analyze, process and/or review data for eDiscovery and support the phases of the Electronic Discovery Reference Model.



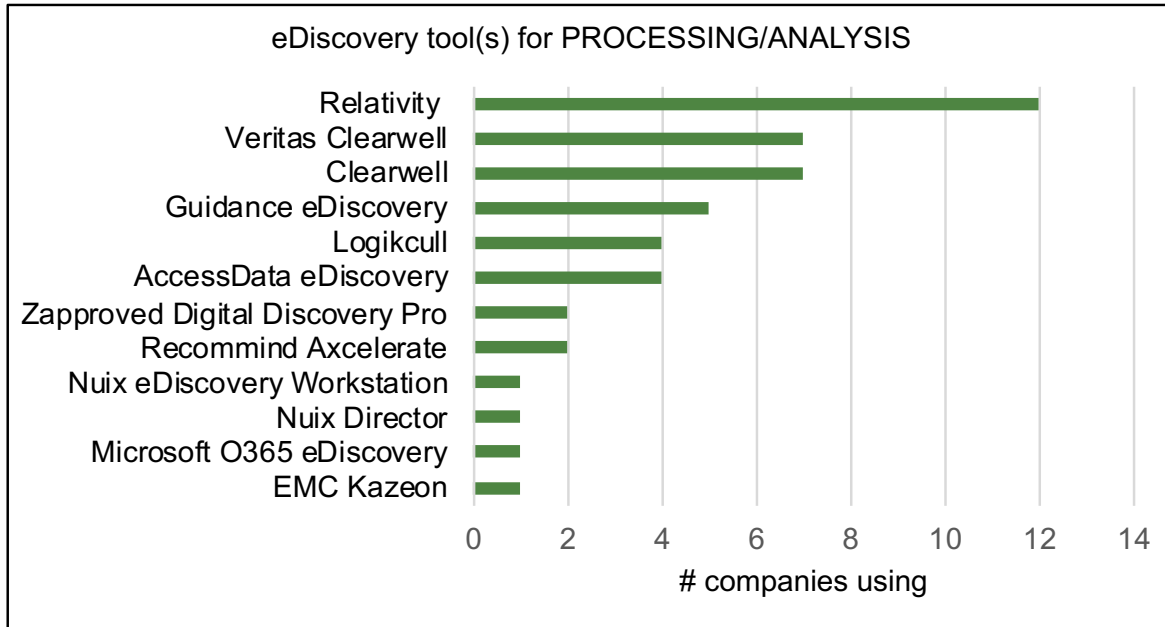
## Who Uses What

Access-Data FTK	Access-Data eD	Cellebrite UFED 4PC	Clearwell	EMC Kaseon	Forensic Toolkit FTK	Guidance Encase eD	Guidance EnCase Forensic	Kcura Relativity	Logikcull	MS O365 eD	Nuix Dir.	Nuix eD Workstation	Recomind Accelerate	Sherpa Softw Discov Attend	Veritas Clearwell	X1 eD
Ingersoll Rand	Caterpillar	Oracle	Chubb	Chubb	Abbott	Abbott	AEP	Purdue	AEP	Fox	Oracle	Abbott	Trans-Canada	Fox	Flagstar	Fox
Oracle	CHS	Purdue	Flagstar		Oracle	AEP	Flagstar	TE	Unisys	Mattel		Daimler			Fox	TE
	Ingersoll Rand		Pru-dential			Shire	Fox			Nike					Unum	
						Wal-greens	Oracle			Purdue						
							TE			Williams						
							Wal-greens									

Other tool(s)	Who is using them
Compliance Data Solutions	CHS
DT Search	Purdue
Proofpoint	Purdue
Zapproved Data Collect	Daimler
zylab	Campbell Soup

## eDiscovery: Processing/Analysis

eDiscovery tools are used to support your legal function for PROCESSING/ANALYSIS



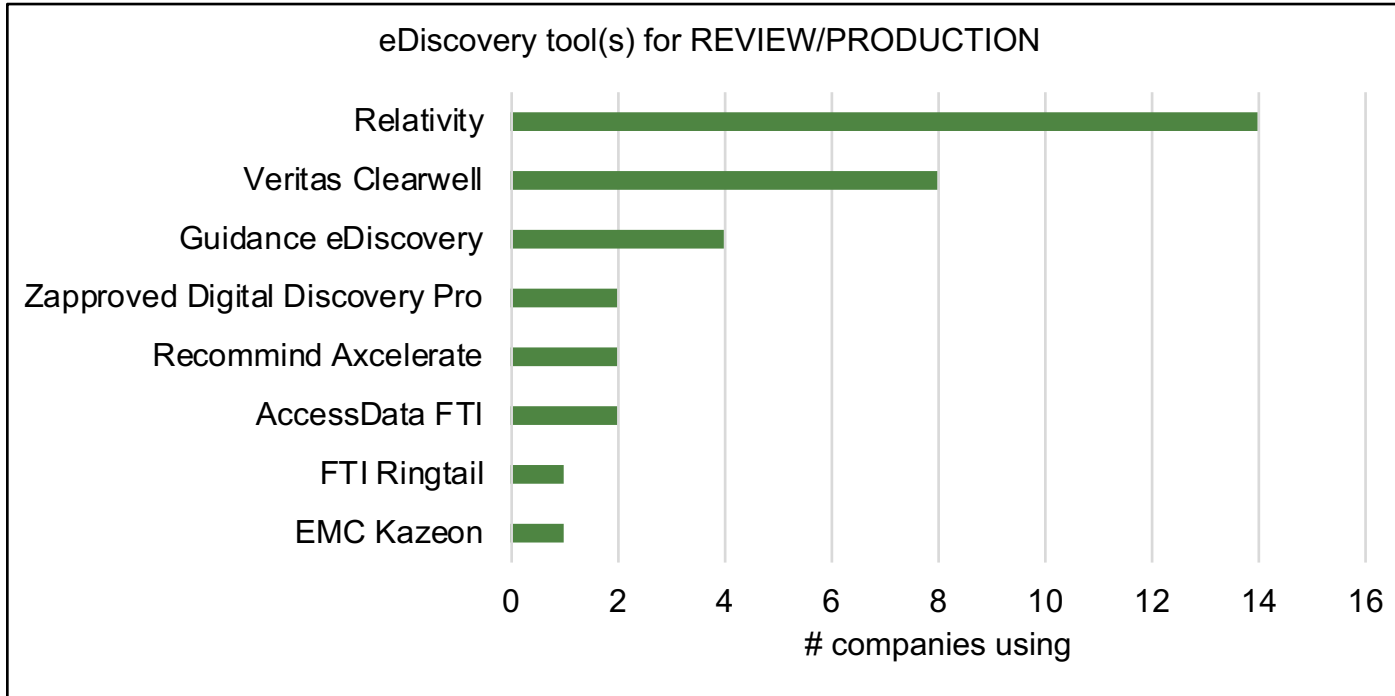
### Who Uses What

Access-Data eD	Clearwell	EMC Kazeon	Guidance eD	Logikcull	Microsoft O365 eD	Nuix Director	Nuix eD Workstation	Recommind Axcelerate	Relativity	Veritas Clearwell	Zapproved Digital Disc Pro
Caterpillar	Chubb	Chubb	Shire	AEP	Purdue	Oracle	Abbott	TransCanada	AEP	Fox	Daimler
CHS	Oracle		Walgreens	Unisys					Ingersoll Rand	Oracle	
Ingersoll Rand	Prudential			Williams					Mattel	Unum	
									Oracle		
									Prudential		
									Purdue		
									TE		

Other tool(s)	Who is using them
Compliance Data Solutions	CHS
zylab	Campbell Soup

## eDiscovery: Review/Production

eDiscovery tools are used to support your legal function for REVIEW/PODUCTION



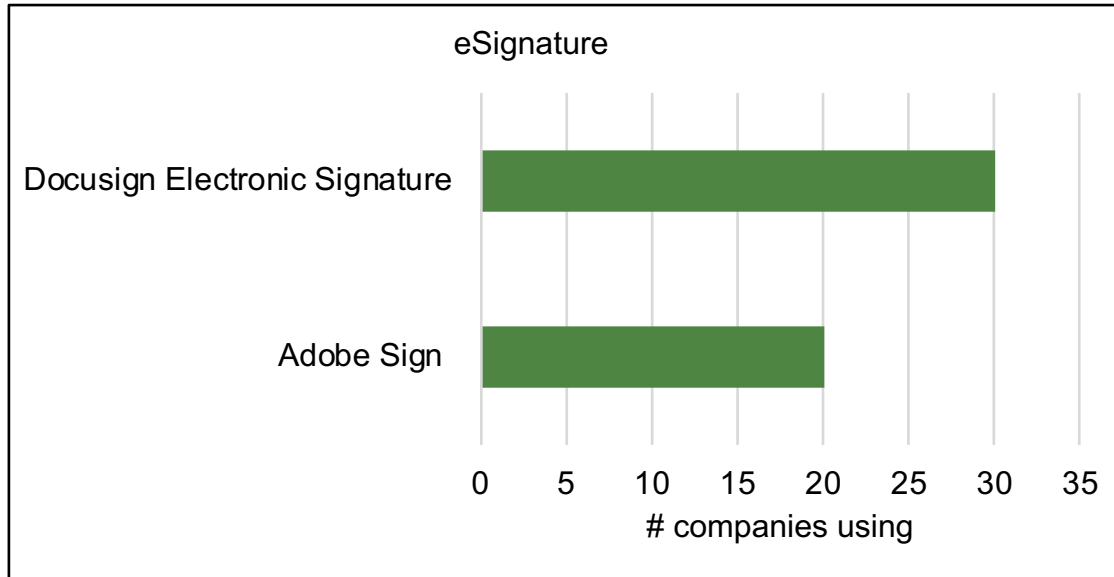
### Who Uses What

AccessData FTI	EMC Kazeon	Guidance eDiscovery	Recommind Axcelerate	Relativity	Veritas Clearwell	Zapproved Digital Discovery Pro
CHS	Chubb	Shire Walgreens	TransCanada	AEP Caterpillar Flagstar Ingersoll Rand Mattel Oracle Prudential Purdue TE Unisys	Fox Oracle Unum	Daimler

Other tool(s)	Who is using them
Compliance Data Solutions	CHS
Logikcull	AEP
zylab	Campbell Soup

## eSignature Tools

eSignature tools are used for electronic sending, signing and managing of agreements



### Who Uses What

Docusign Electronic Signature	Adobe Sign
Abbott	Abbott
AEP	Blackbaud
AIG	CDW
Campbell Soup	Dell
Caterpillar	Flagstar
Chubb	Fox
CSL Behring	Husqvarna
Daimler	Mattel
Hasbro	Nike
Inaram Micro	Oracle
Intelliaent Medical	Reckitt Benckiser
Mattel	Unum

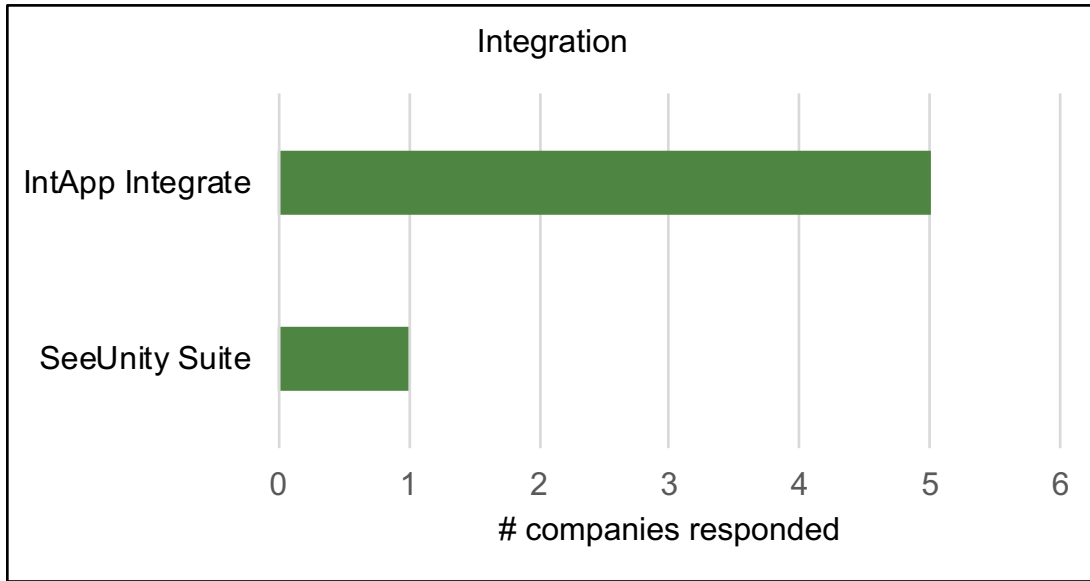
DocuSign Electronic Signature	Adobe Sign
Mondelez	
Procore	
Prudential	
Purdue	
Sun Life	
TE	
TransCanada	

Other tool(s)	Who is using them
Hello Sign integrations	Procore



## Integration Tools

Integration tools are used to provide a way to connect and manage software applications and automate a variety of critical business processes.

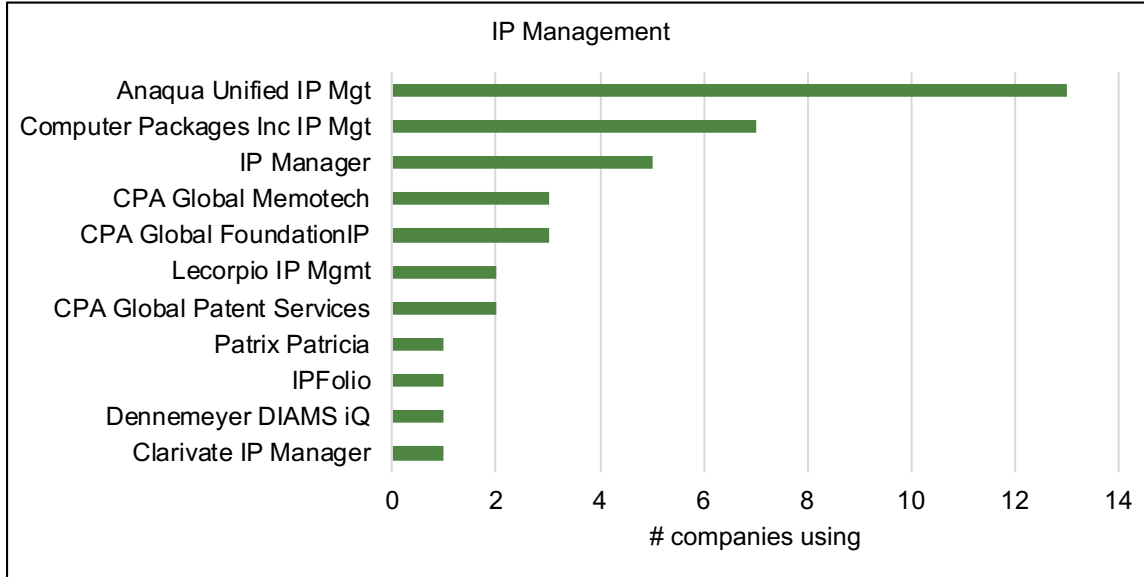


## Who Uses What

IntApp Integrate	SeeUnity Suite
Abbott	Fox
Caterpillar	
Flagstar	
Mattel	
Other tool(s)	Who is using them
API	Daimler
Salesforce	AECOM

## IP Management Tools

IP management tools are used to track and manage IP portfolios (Patents and Trademarks), provide docketing support, and process annuity payments.



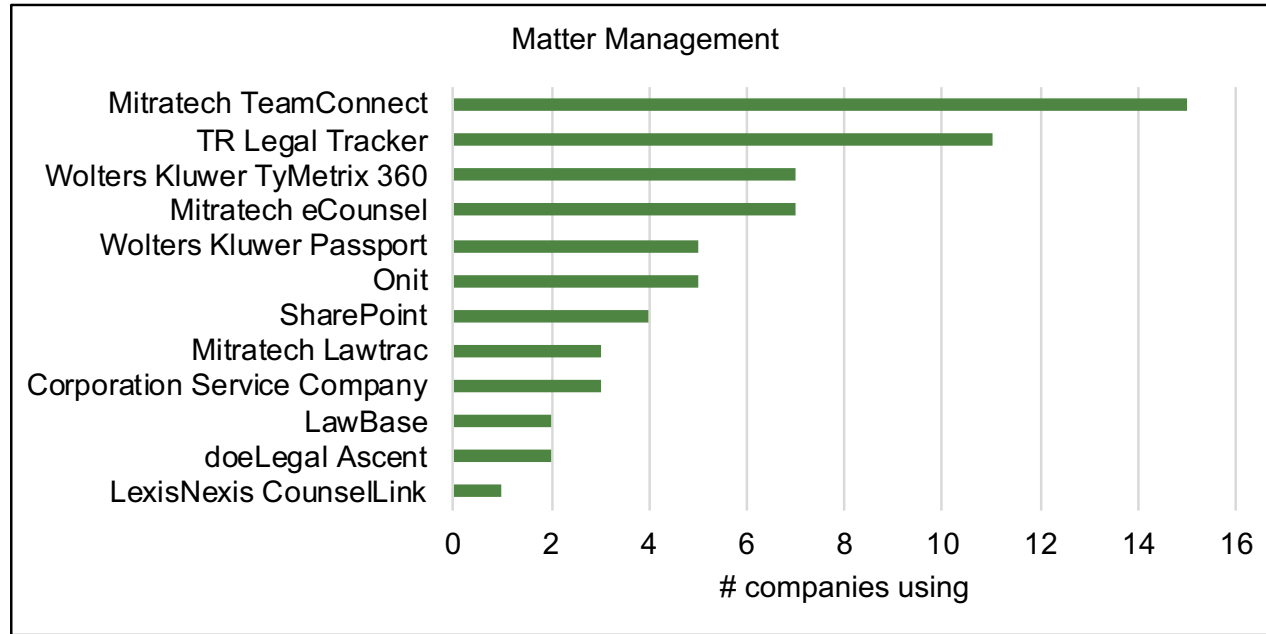
## Who Uses What

Anaqua Unified IP Management	Clarivate IP Manager	Computer Packages Inc. IP Management	CPA Global Foundation IP	CPA Global Memotech	IP Manager	Patrx Patricia
Caterpillar	Abbott	Campbell Soup	Nike	TE	Abbott	Lonza
Dell		Mattel	Oracle		Caterpillar	
Fox		Walgreens				
Ingersoll Rand						
Lonza						
Mondelez						
Nike						
Purdue						
Shire						

Other tool(s)	Who is using them
TeamConnect	Sun Life
TyMetrix	Mondelez

## Matter Management Tools

Matter management tools are used to manage and track legal matters, day-to-day matter work and matter budgets.



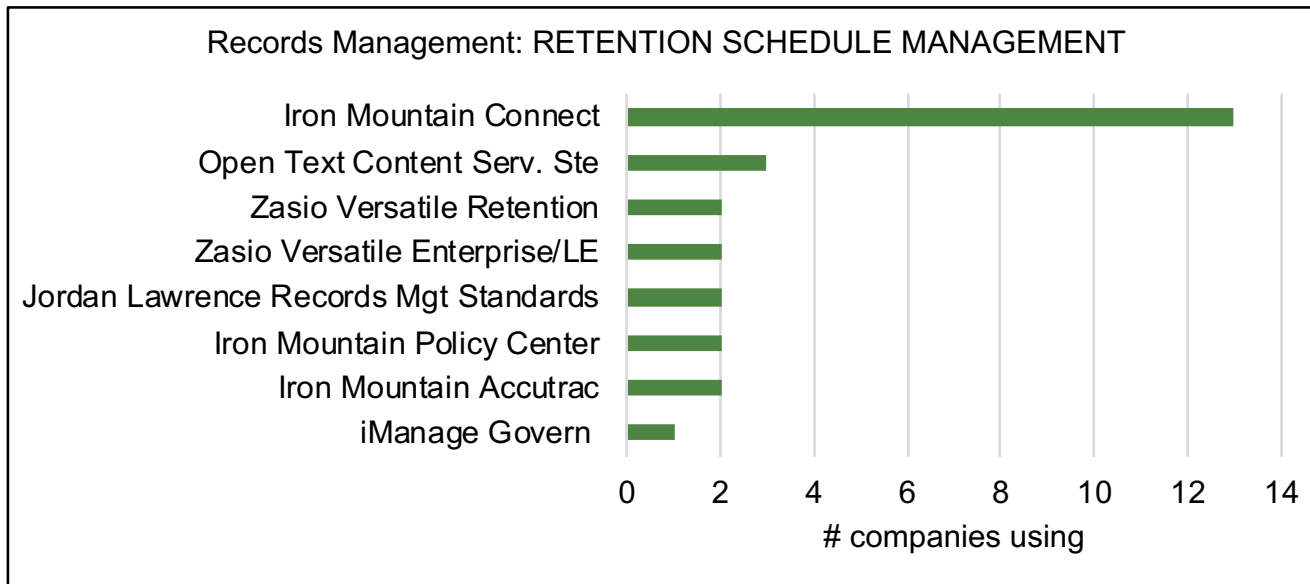
## Who Uses What

Corporation Service Company	Doe-Legal Ascent	LawBase	Mitratesch eCounsel	Mitratesch Lawtrac	Mitratesch Team-Connect	Onit	SharePoint	TR Legal Tracker	Wolters Kluwer Passport	Wolters Kluwer TyMetrix 360
Ingram Micro	Yazaki	TransCanada	Abbott	Ingersoll Rand	AEP	Abbott	Chubb	AECOM	Walgreens	CHS
PPG			CDW		AIG	AIG	Hasbro	Husqvarna		Chubb
			Flagstar		Campbell	Prudential	Jackson	Nike		Dell
			Mattel		Daimler			Unum		Lonza
			Unisys		Ingersoll Rand					TE
					Prudential					
					Purdue					
					Reckitt Benckiser					
					Shire					
					Sun Life					
					Williams					

Other tool(s)	Who is using them
eCounsel	Caterpillar
LawManager	Mondelez; Mutual of Omaha

## Records Management Tools: Retention Schedule Management

Records Management tools are used to manage your inventory of records. Typical items tracked include paper records, tapes, electronic media and electronic data. Items tracked can be onsite or offsite depending on the tool in use. Search, track and retrieve records through a single interface and map the records against your records retention schedule. Some tools allow for the creation, management and hosting of your records retention schedule.

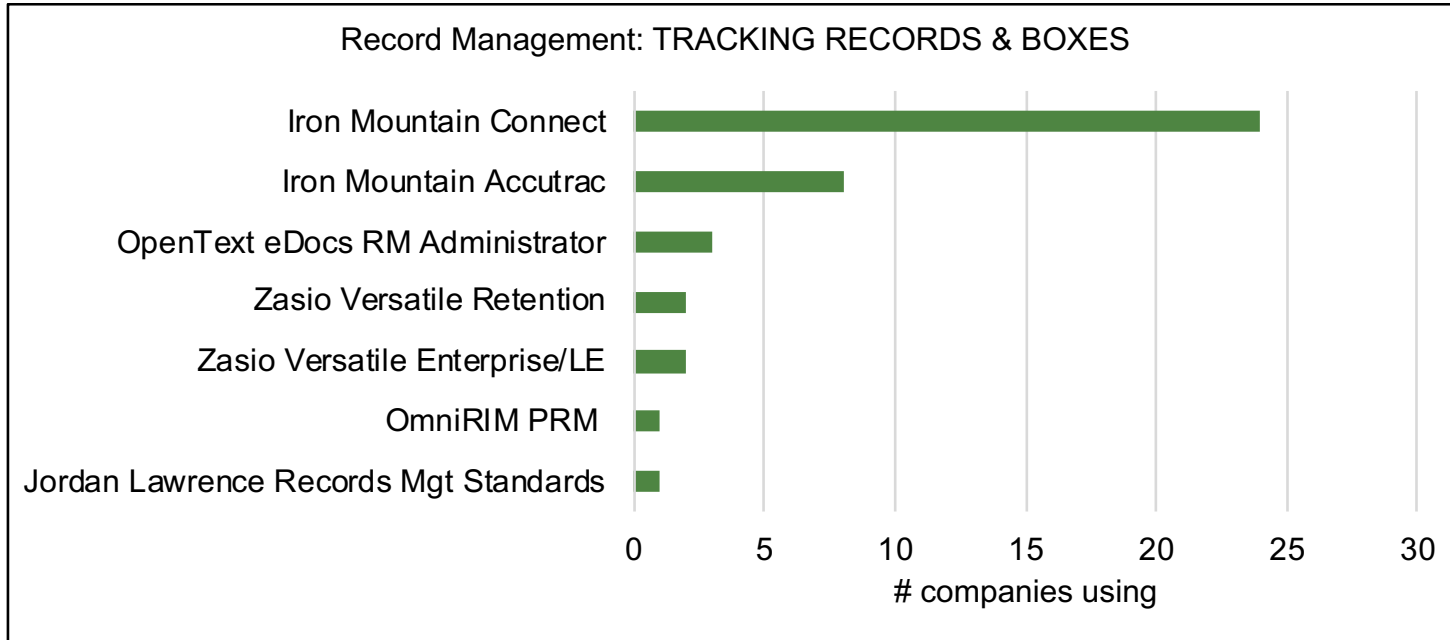


### Who Uses What

Iron Mountain	Iron Mountain	Iron Mountain	Jordan Lawrence Records	Open Text Content Serv.	Zasio Versatile Ret.
Oracle	AEP	Campbell	Intelligent Medical	Abbott	Daimler
Mondelez	Chubb	Oracle		Fox	
	Flagstar			Nike	
	Oracle				
	Prudential				
	Sun Life				
	Unum				
	Walgreens				

Other tool(s)	Who is using them
GRM/Sharepoint	Purdue

## Record Management Tools: Tracking Records & Boxes



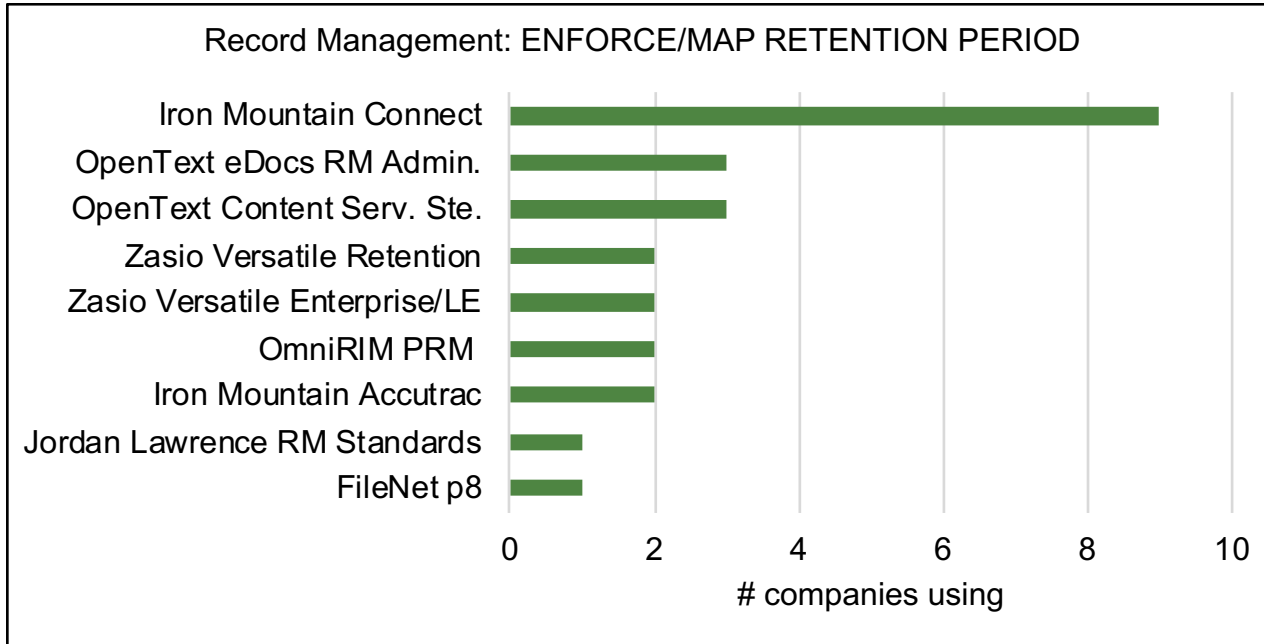
### Who Uses What

Iron Mountain Accutrac	Iron Mountain Connect	Jordan Lawrence Records Mgt. Standards	OmniRIM PRM	OpenText eDocs RM Administrator	Zasio Versatile Retention
Abbott	AECOM	Intelligent Medical	Williams	Fox	Daimler
CHS	AEP			Mutual of Omaha	
Ingersoll Rand	Chubb			Unum	
Mondelez	Flagstar				
Nike	Husqvarna				
Oracle	Ingram Micro				
TE	Lonza				
	Oracle				
	Prudential				
	Shire				
	Sun Life				
	TE				

Iron Mountain Accutrac	Iron Mountain Connect	Jordan Lawrence Records Mgt. Standards	OmniRIM PRM	OpenText eDocs RM Administrator	Zasio Versatile Retention
	TransCanada				
	Unisys				
	Unum				
	Walgreens				

Other tool(s)	Who is using them
Excel	CSL Behring
GRM/Sharepoint	Purdue
O'Neil/RWeb	Oracle

## Records Management Tools: Enforcement Retention Period



### Who Uses What

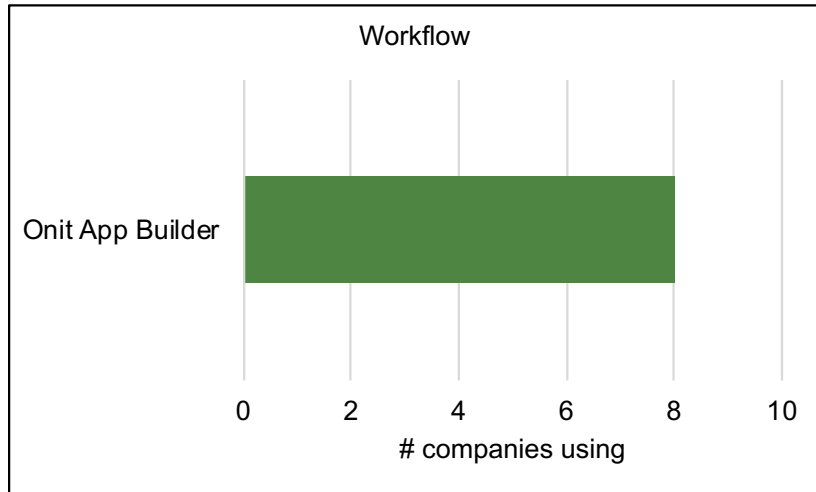
Iron Mountain Accutrac	Iron Mountain Connect	Jordan Lawrence RM Standards	OmniRIM PRM	OpenText Content Serv. Ste.	OpenText eDocs RM Admin.	Zasio Versatile Retention
Mondelez	AECOM	Intelligent Medical	Williams	Nike	Mutual of Omaha	Daimler
Oracle	AEP			Unum	Unum	
	Campbell Soup					
	Chubb					
	Oracle					
	Shire					
	Sun Life					

Other tool(s)	Who is using them
Excel	CSL Behring
O'Neil/RSWeb	Oracle



## Workflow Tools

Workflow tools are used to automate business processes.



## Who Uses What

Onit App Builder

AIG

Abbott

Caterpillar

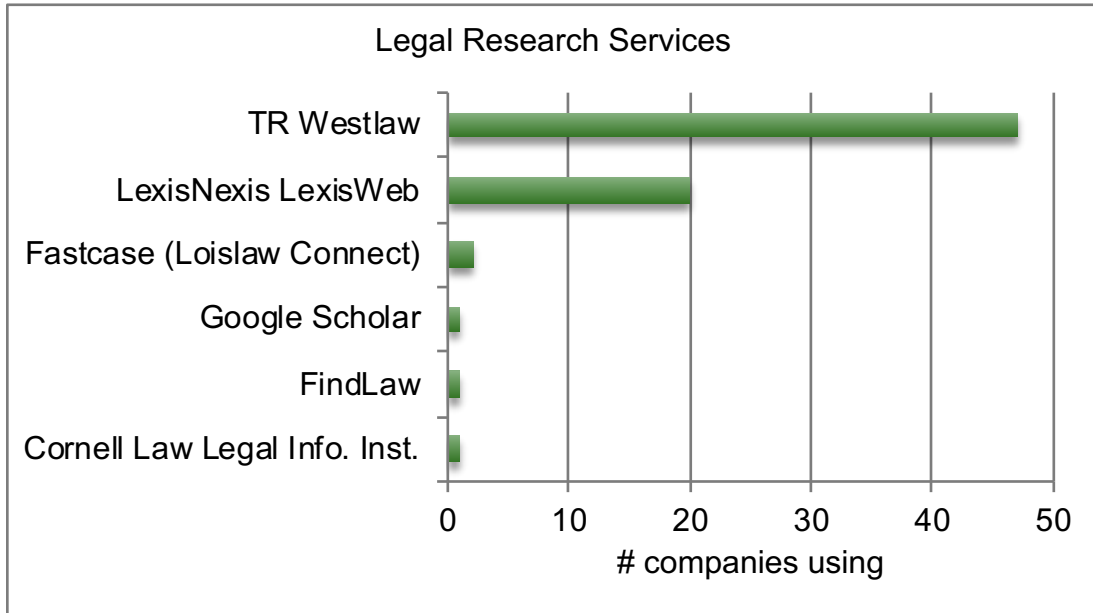
Chubb

Prudential

TE

Other tool(s)	Who is using them
Laserfiche	Intelligent Medical
Salesforce	AECOM
Office 365	Yazaki
ServiceNow Legal Catalog	Unum
TeamConnect	Campbell Soup

## Legal Research Services



## Who Uses What

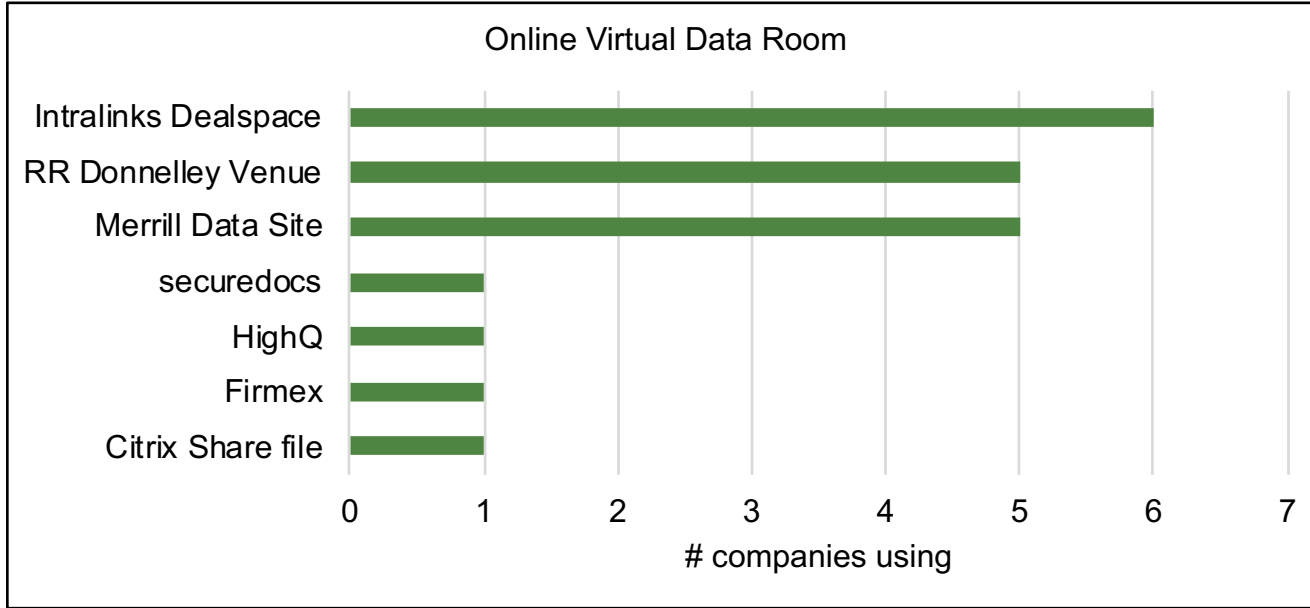
Cornell Law Legal Info. Inst.	FindLaw	LexisNexis LexisWeb	TR Westlaw
Procure	Shire	Abbott	Abbott
		Campbell Soup	AECOM
		Chubb	AEP
		Daimler	Campbell Soup
		Flagstar	Caterpillar
		Jackson	CHS
		Mondelez	CSL Behring
		Mutual of Omaha	Dell
		Prudential	Husqvarna
		Purdue	Intelligent Medical

Cornell Law Legal Info. Inst.	FindLaw	LexisNexis LexisWeb	TR Westlaw
		Shire	Nike
		Sun Life	Oracle
		TE	Procore
		Unisys	Prudential
		Unum	Purdue
			Reckitt Benckiser
			Sun Life
			TransCanada
			Unum
			Williams

Other tool(s)	Who is using them
Industry specific law utilities	Prudential
LexisAdvance	Walgreens
West Practical Law	Intelligent Medical; Jackson

## Online Virtual Data Room

Online virtual data room repositories are used as part of due diligence and acquisition activities to allow the secure exchange of information between the parties.



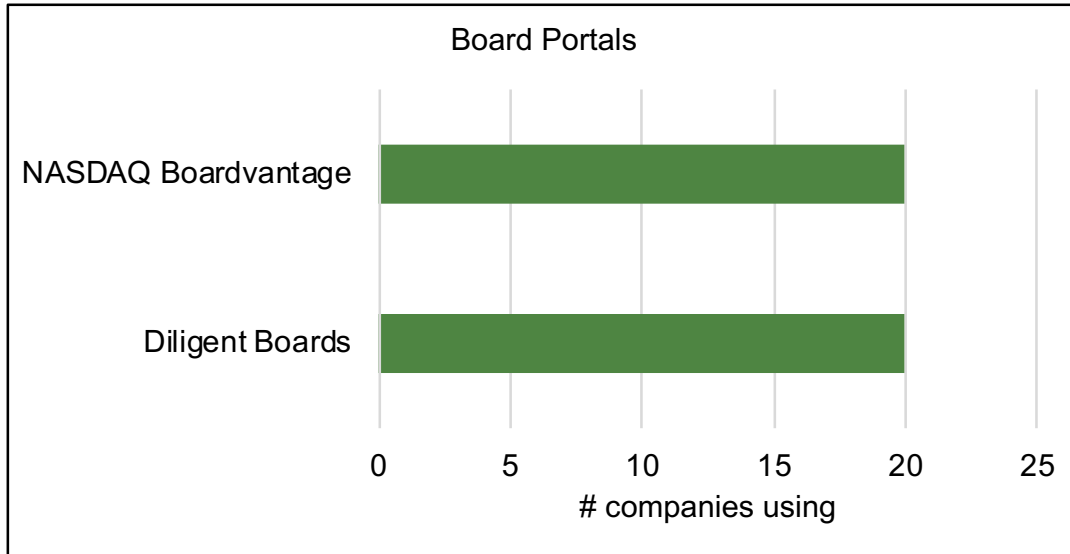
## Who Uses What

Citrix Share file	Intralinks Dealspace	Merrill Data Site	RR Donnelley Venue
Intelligent Medical	Chubb	Campbell Soup	CDW
	Prudential	TransCanada	Husqvarna
	Sun Life		Procore
	TE		

Other tool(s)	Who is using them
Accellion	Flagstar
Secure Docs	Procore

## Board Portals

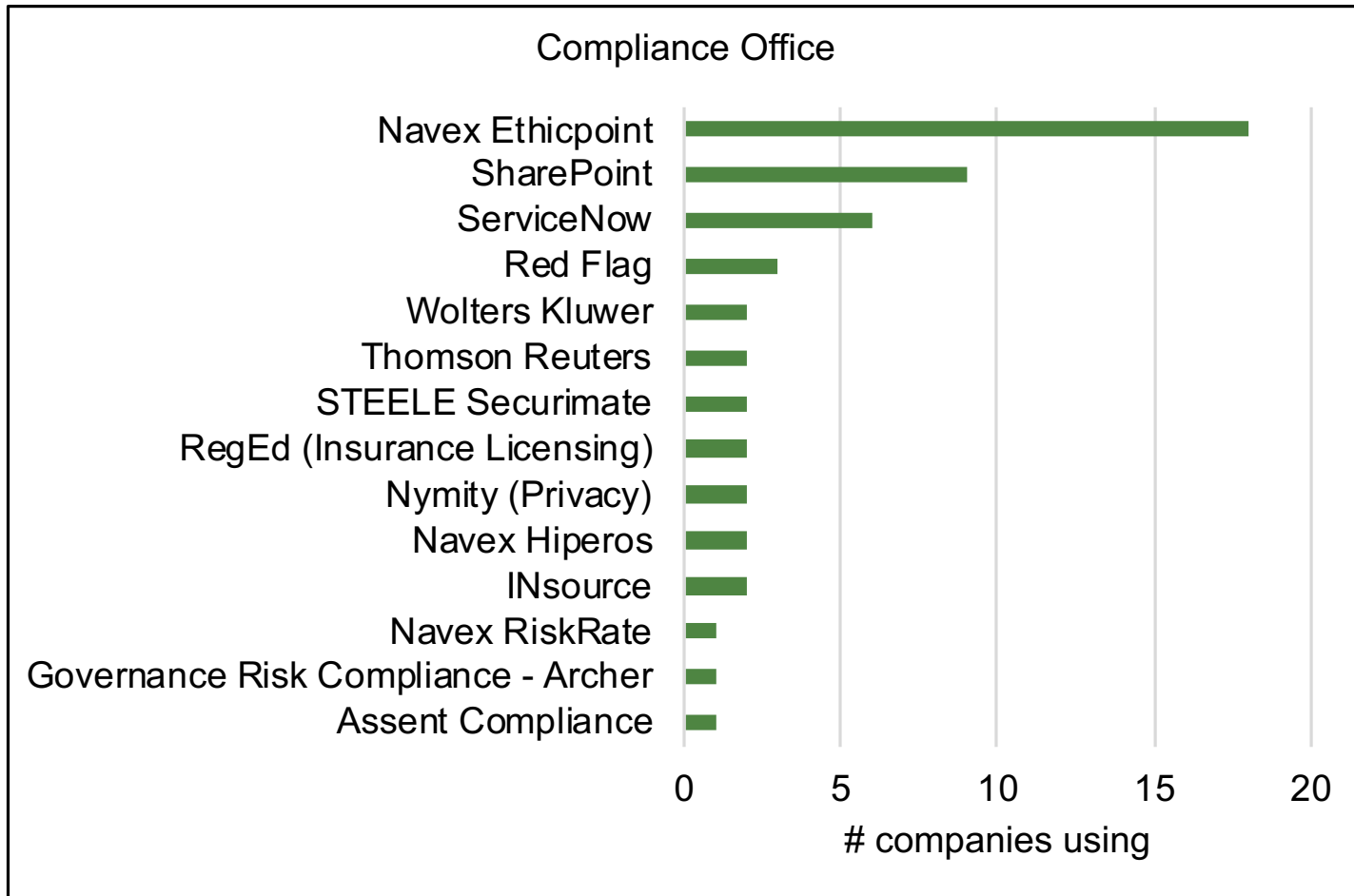
Board portals are collaborative software solutions that help manage and distribute board meeting materials as well as facilitate corporate leadership communication.



### Who Uses What

Diligent Boards	NASDAQ
Blackbaud	Abbott
Campbell Soup	AEP
Jackson	CDW
Lonza	CHS
Mondelez	Flagstar
Sun Life	Ingram Micro
TE	Mattel
Unum	Nike
	Prudential
	TransCanada
	Walgreens
	Williams

## Compliance Office Tools



## Who Uses What

As-sent	Govern. Risk Comp Archer	IN source	Navex Ethic-point	Navex Hiperos	Navex RiskRate	Nymity (Privacy)	Red Flag	RegEd (Ins. Lic.)	Service Now	Share Point	STEELE Securi-mate	Thomson Reuters	Wolters Kluwer
TE	Prudential	Jackson	Blackbaud CDW CHS Daimler Dell Ingram Micro Jackson Mondelez Oracle Prudential TE Williams	CHS	CSL Behring	Unisys	Abbott	Prudential	Blackbaud Campbell Soup Prudential Unum	Chubb Ingram Micro Prudential Sun Life TE Unum	TE	Prudential	Chubb

Other tool(s)	Who is using them
Convercent (SAI Global, Amber Road) (Office of the Ombudsman)	TE
InTouch (Ethix360)	Yazaki
OpenPages	Sun Life
Radar	Unum

## Open Ended Question

Any other tool(s) you are currently using to support your legal function not captured in this survey?

Other tool(s)	Who is using them
Effects (Wolters Kluwer) for Entity/subsidiary Management.	Purdue
IP Forecaster (CPA Global) tool	Nike
Navigant/PACE - Mass Tort Claims Matter Mgt.	Ingersoll Rand
Pro Lease - Real Estate	TE
Questal	TE
Survey Monkey	TE
Versaic	TE
YourCause	TE



## Directory of Contact Information

Company	Name	Title	Email address
Abbott	Kedric Chamberlin	Director, Legal Systems	kedric.chamberlin@abbott.com
AECOM	Wojciech Kowalczyk	Legal Operations Director	wojciech.kowalczyk@aecom.com
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