

CASE STUDY



OpenBox and Allegory: co-designing a better platform for litigators and a business model for investors

A case study is an instructional method about a situation or event. At its best, it zeros in on a problem or issue so that students can observe, analyze, summarize, and/or offer recommendations. Case studies are usually based on real-world challenges by real organizations.

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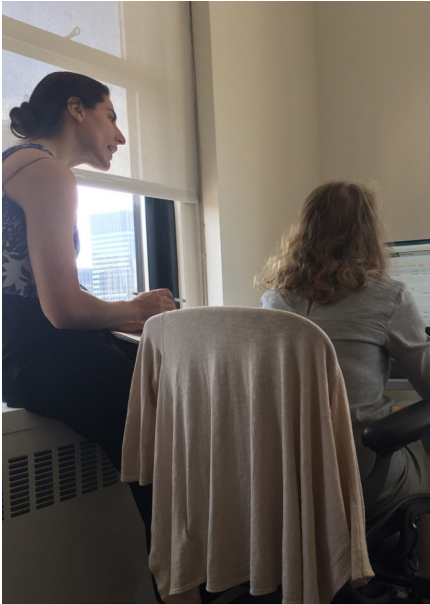
Openbox is a New York-based design consultancy that provides talent, services, and resources to companies seeking to up their game. In 2016, its research, strategy and design-thinking arm, Openbox Design & Innovation was approached by Allegory, a legal technology start-up, to scale their new platform and attract business investors. Allegory's platform was designed to simplify how law firms manage and access case files. The founder sought to sell the platform as a new venture, but struggled to build a customer base and scale its business. Openbox engaged some of Allegory's first customers to deliver a holistic solution that drastically improved the platform's user experience and, with it, Allegory's brand. The result was creation of a valuable IP for potential investors.

Key Facts

- Openbox: founded in 2012, a division of Opendox, New York City, NY
- www.opnbx.com
- Allegory: founded in 2011, owned by Integreon Inc., New York City, NY
- www.allegorylaw.com

Disclaimer: This case was prepared for the Business Design Initiative at the Rotman School of Management, University of Toronto. The information was provided by Openbox D&I and is intended to serve as a basis of student discussion on design-led innovation practice.

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The challenge

Historically, the US legal industry has been slow to move from paper-based and hierarchical systems, restricting the flow of information between legal parties. In 2011, the legal tech start-up Allegory had identified the industry's need to improve 'legal case information processes', specifically to improve the efficiency and effectiveness of the management of litigation case information. Through a series of early research and development cycles, Allegory had designed and proposed a new platform aimed at meeting the needs of litigation legal teams. However, the platform solution was not fully effective for lawyers, and it didn't address the challenges of the industry's antiquated systems.

In 2016, Allegory engaged Openbox to develop a better user experience for their new platform, with the goal of increasing market adoption and valuation. A New York city-based design consultancy, Openbox's mission is to help its clients design for trust, by focusing on people-centred strategies and offers. The team worked closely with Allegory to better understand their users' needs and to redesign the platform, with the goal of scaling the business and making it a desirable acquisition target for investors.

The OpenBox methodology

Founded by Marquise Stillwell, Openbox is a division of Opendox, a film production company. Openbox uses its proprietary design methodology (Discover, Make, Test and Activate) to help clients generate good ideas that scale for social impact within three key industry verticals: design, film, and venture

The approach: Design strategy and research of the legal industry

During the Discover phase, the Openbox team faced challenges due to the legal industry's complex and private nature. The team opted to design a research plan and process that included:

- Secondary research on the legal industry and the competition
- Primary research by interviewing key stakeholders (e.g. law firm partners), shadowing lawyers, and visiting court houses to witness legal proceedings.

Their initial finding was that the platform's interface frustrated lawyers. Early customers struggled to use it, would quickly abandon the tool, and were unhappy about paying for what they saw as an ineffective service.

Deeper research found that there were distinct stakeholder groups with different needs, each requiring a customized interface to access information during and between court proceedings. The team developed a deeper understanding of the difficulty lawyers faced in trying to access a range of information from multiple sources.

As a result, the Openbox team was able to develop six distinct user personas to guide the design of a customizable platform that would address each persona's goals and needs throughout their specific litigation processes. Working with Allegory's team and clients, several designs were prototyped and tested to facilitate optimum user

engagement. Through the Make and Test phases, Openbox was able to finesse the product to meet the distinctive functional needs of each user, ultimately creating a modular system in which each user group could access their documentation from a personalized dashboard.

Openbox crafted detailed use cases for Allegory that included:

- senior executives or partners seeking insights into the numerous cases under their supervision.
- legal firm information management leaders seeking to improve their internal processes.
- associate and paralegal professionals seeking to access documents from the courthouse or their office.
- corporate counsel representatives seeking visibility of the general litigation case processes.

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The conclusion

An effective solution was only designed when Openbox identified distinctive stakeholder groups and deeply understood their needs. Through its design methodology, it was able to co-create a holistic experience which:

- improved Allegory's user- experience and interface,
- offered the company a new identify and brand, and
- allowed it to redesign its sales process and investor pitch deck. Ultimately, this led to Allegory being acquired. The case offers proof of the impact that human-centred design can make in transforming businesses.