

CASE STUDY

From Day 1 Readiness to Legal Transformation

How a major transportation and logistics company established an independent legal function with Consilio

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When a major North American transportation and logistics company separated from its parent organization, its legal team needed to become operationally independent against a fixed deadline, without disrupting critical services.

Consilio immediately brought together three foundational practice areas: eDiscovery, Flex Talent and Legal Transformation Services. Together, these capabilities established the client's Day 1 readiness by connecting the people, processes, information and technology needed for a successful transition, while creating a scalable foundation for future legal operations.

The engagement built on a relationship spanning more than 20 years, beginning with eDiscovery and expanding into flexible legal talent and legal transformation. Consilio's knowledge of the parent organization's systems, policies and ways of working, combined with an existing commercial framework, enabled the team to mobilize quickly and reduce transition risk.

An integrated approach to operational independence

Consilio brought together the following capabilities to support the client's immediate separation requirements and longer-term transformation:

- Establishing a standalone Onit matter and spend management environment
- Developing legal service request workflows and additional Onit functionality
- Delivering an end-to-end NetDocuments implementation
- Migrating legal documents and matter information from eDOCS
- Designing the information architecture and security model
- Coordinating testing, training, change management, go-live and hypercare
- Supporting the planned integration of Onit and NetDocuments
- Providing flexible legal talent to maintain capacity and continuity

More than two decades of trust enabled Consilio to move quickly, connect people and technology, and support the client through a business-critical separation.

PARTNERSHIP IN ACTION

Establishing an independent legal operation

The separation required the client to establish independent eDiscovery operations and new legal hold and collection workflows for employees moving from the parent organization.

Consilio provisioned a dedicated RelativityOne environment, migrated existing matters from the parent company's instance and implemented RelativityOne Legal Hold and Collect. The legal hold process was also integrated with Workday, supported by team training and a new operational playbook documenting recommended workflows and best practices.

✓ The Impact

The client gained an independent eDiscovery environment, repeatable workflows and the operational knowledge needed to manage new matters.

Creating a standalone matter and spend environment

The client chose to retain Onit as its matter and spend management platform.

Working with Onit, Consilio created a dedicated environment based on the parent organization's existing platform. Functionality connected to the parent and its other operating companies was removed or disabled, establishing the separation and controls required for independence.

Following the initial deployment, Consilio continued supporting enhancements to the Onit environment, including legal service request workflows and additional application functionality.

✓ The Impact

A dedicated matter and spend management environment provided the operational foundation for the independent legal function while preserving familiar technology and ways of working.

Providing critical legal capacity

Consilio initially placed two flexible contract attorneys with the parent organization to support the separation. When the new company became independent, it chose to retain both attorneys on an ongoing basis, preserving valuable capacity, continuity and institutional knowledge.

Following the successful transition, the engagement expanded to include recruitment for additional capabilities across:

- Data privacy
- IT contracting
- Legal technology support

This scalable model gave the legal team immediate access to experienced professionals while allowing it to adapt its capacity and capabilities as the organization matured.

✓ The Impact

The client maintained continuity throughout the separation and gained a flexible talent model that could scale with the evolving needs of its independent legal function.

Modernizing document management

Consilio was engaged to deliver an end-to-end NetDocuments implementation, moving the client from eDOCS to a modern, cloud-based document management platform.

The work included solution design, configuration and implementation support, with a focus on:

- Separating and migrating the appropriate legal documents and matter information
- Preserving document integrity, metadata and access controls
- Strengthening information security and governance
- Improving document organization, search and collaboration
- Maintaining access to essential information throughout the transition
- Creating a scalable foundation for future digital and AI-enabled capabilities

✓ The Impact

The new platform will provide a more secure, accessible and scalable environment for managing legal information while minimizing disruption throughout the transition.

Consilio is leading the migration workstream, including content assessment, data mapping, extraction, transformation, validation and production cutover. Testing, training, change management, go-live and post-launch support are also included in the engagement.

Connecting the legal technology environment

Once Onit and NetDocuments are live, the client plans to connect the platforms using Onit's out-of-the-box NetDocuments integration, supported by Consilio.

The integration will enable new matters created in Onit to trigger the creation of corresponding workspaces in NetDocuments. It will also allow relevant information to move between the platforms and provide users with access to NetDocuments from within Onit.

✓ The Impact

The connected environment will reduce manual effort, improve consistency and make it easier for users to manage documents within their matter management workflows.

WHAT THE PARTNERSHIP HAS DELIVERED

The engagement enabled the client to address the immediate demands of separation while progressing a broader legal transformation:

- A standalone Onit matter and spend management environment
- Continuity of essential legal operations through Day 1
- Two flexible contract attorneys retained by the independent organization
- Expanded talent support across data privacy, IT contracting and legal technology
- An end-to-end NetDocuments implementation progressing toward go-live
- Consilio-led migration of legal documents and matter information from eDOCS
- Further Onit workflows and application functionality under development
- A planned integration between Onit and NetDocuments

The client's decision to retain the original contract attorneys, expand its team with specialist roles and continue into a second phase of technology development demonstrates how a time-sensitive separation project evolved into an ongoing transformation partnership.

Results at a Glance

- **Three foundational Consilio practices** mobilized around a single Day 1 objective: **eDiscovery, Flex Talent and Legal Transformation Services**
- **Standalone Onit matter and spend management environment established** for Day 1 independence
- **End-to-end NetDocuments implementation** spanning design, configuration, migration, testing, training and go-live support
- **Legal documents and matter information migrated from eDOCS** into a dedicated NetDocuments environment
- **Two flexible contract attorneys retained** by the newly independent organization
- Talent requirements expanded across **data privacy, IT contracting and legal technology support**
- **Second phase of Onit development initiated**, including legal service request workflows and additional functionality
- **Onit and NetDocuments integration** planned to connect matter creation with corresponding document workspaces
- More than 20 years of trusted partnership expanded into an **ongoing legal transformation relationship**

AN EXPANDING TRANSFORMATION PARTNERSHIP

Successful delivery during the separation strengthened an already trusted relationship and created opportunities for Consilio to support the client beyond the original scope.

With a deeper understanding of the client's legal operations, technology environment and evolving priorities, Consilio was subsequently engaged to support its contract lifecycle management requirements. Although this work was not part of the original divestment engagement, it reflects the confidence built through the wider relationship.

What began as support for a time-sensitive separation has evolved into an ongoing transformation partnership. By bringing together eDiscovery, Flex Talent and Legal Transformation Services, Consilio connected the people, processes, information and technology required to maintain continuity through a critical transition and build a more capable, connected and scalable legal function for the future.



Preparing your legal function for a divestment, acquisition or merger?

Talk to Consilio about how our integrated legal technology, operations and flexible talent capabilities can help you reduce transition risk, maintain business continuity and be ready for Day 1 and beyond.

For more information, visit [Consilio.com](https://www.consilio.com).



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