

# Legal Process Outsourcing = High Productivity And Cost Cuts

The Editor interviews **Arihant Patni**, Co-Founder and Chief Executive Officer, Bodhi Global Services (P) Ltd.

**Editor:** Ari, please describe Bodhi Global.

**Patni:** Bodhi Global is a young legal support services company that caters to international law firms and corporations located in the U.S., UK and India. Our attorneys in New York and Pune (India) deliver services in areas of litigation support, corporate due diligence, contract management, compliance and regulatory research, and intellectual property. The promoters of Bodhi Global are two organizations with global reputations – each of which is extremely well established in its field of expertise. With this backing, Bodhi Global has already achieved great success.

One promoter group consists of the founding partners of AZB & Partners, which is among the largest law firms in India with almost 300 attorneys across three cities. AZB as a premier Indian law firm brings significant domain expertise to the table, along with a well-established client base, including most big U.S. and UK law firms as well as several Fortune 500 companies. They are able to help us ensure that the quality of our attorneys and our work product remains consistently high.

The other is the Patni Family, a well-established IT group in India, whose holdings include companies listed on the stock exchanges in New York and India. With combined revenue of close to one billion U.S. dollars, the Patni companies currently employ about 15,000 people who service several Fortune 1000 clients from offices across the globe.

The idea behind Bodhi Global is to create an amalgamation of law and technology.

Its goal is to apply technology and modern management techniques to improve law firm and corporate law department productivity by providing services that free up highly paid corporate counsel and law firm lawyers to perform the intellectually challenging work that attracted them to the practice of law.

Bodhi Global has a completely independent corporate identity. This gives it the flexibility to structure its organization and practices to reflect the special needs of its clients. We have the best of both worlds – we have the flexibility to remain young and agile, while being able to look to our promoters for substantial backing.

**Editor:** Tell us about your background.

**Patni:** I went to the University of Pennsylvania for my Chemical Engineering degree. I also have a degree in Entrepreneurship from Babson College in Boston and a masters degree in Finance and Statistics from Columbia University in New York. My work experience is concentrated in the field of technology and entrepreneurship where I have spearheaded roles in IT, business development and management. I have worked with the Patni family businesses as well as both young and established companies based in the U.S. I returned to India in 2004 and in 2006 established Bodhi Global, with the support of the promoters.

**Editor:** What is your role at Bodhi Global?



**Arihant Patni**

**Patni:** I am the CEO of Bodhi Global, so I am involved in pretty much everything from plugging in computers to meeting clients in New York! Along with a young yet highly qualified management team, we strive to bring energy and enthusiasm to the services that we provide. Our team is comprised of experts on law, technology, data security, quality control and process management and we all work with the goal of providing quality-driven and client-centric solutions.

**Editor:** What advantages does legal process outsourcing (LPO) offer to law departments and law firms?

**Patni:** Outsourcing in general offers significant cost benefits and scalability. Most importantly, it makes it possible for a business to greatly enhance the productivity of its staff by outsourcing non-core work, which enables the staff to focus on what they do best. It affords a great deal of flexibility with respect to staffing.

Legal process outsourcing presents a special challenge in that those who execute the work must be lawyers and must be knowledgeable about the law of the jurisdiction that is applicable to the outsourced work. That is why recruitment, training and active supervision by qualified professionals play a critical role in the delivery of these services. Also, given the sensitivity of the work, client and vendor must work together to identify specific tasks that can be outsourced successfully. This differentiates the work of an LPO from other kinds of outsourcing. That said, once the project has been scoped, it can be executed in a better, faster, cheaper manner by using lower-cost human resources, efficient project management and quality-driven protocols.

**Editor:** To what extent has e-discovery affected your business?

**Patni:** Review of documents in connection with e-discovery is ideally suited to outsourcing. With e-discovery, all of the documents are collected and hosted on web-based platforms that can easily be accessed from anywhere in the world. Furthermore, the data can be easily sliced and diced so that, if necessary, only lower sensitivity work can be allocated to offshore resources.

With today's advanced technology, one can be assured that the team is always synchronized and the client is kept abreast on a real time basis. Bodhi Global's stringent confidentiality and data security standards ensure the safety of client information (Bodhi Global was one of the first LPOs in India to receive an ISO 27001 certificate, an international data security standard that helps to identify, control and minimize a vast array of threats to which digital information is regularly subject).

**Editor:** How do you go about selecting and training the Indian lawyers you use for document reviews?

**Patni:** Training is really an important differentiator for us. We are based in Pune, which has two of the best law schools in the country. We select lawyers only after extensive interviewing and testing. They then must undergo almost a month-long training program, which includes training modules in U.S., UK and Indian law. The training is conducted by relevant industry experts. For example, a professor from a leading national law school in the U.S. has devised a specific training module on litigation for us. Before starting a project, the reviewers are trained with respect to the case at hand by experienced U.S. attorneys and by our Indian management team.

**Editor:** How do you assure the quality of the work?

**Patni:** We maintain quality by active supervision, painstaking documentation and rigorous accuracy monitoring through real time metrics. When a project comes in, we assign it to a team led by a project manager and a subject matter expert (someone who has a good grip on the legal aspects of the case). While the project manager takes care of work allocation, productivity reports and overall communication across stakeholders, the subject matter expert works closely with the U.S. team and manages training and substantive aspects of review (including documenting training and review manuals). This person also creates a quality control team to make sure that the quality of the work meets the highest standards.

We also run a second level of review. This is performed by U.S. lawyers in New York who specialize in the practice area involved (some with almost 20 years experience) and ensure the high quality of the work of our Indian lawyers by constantly supervising and reviewing an intelligent sampling of their work. What constitutes such a sampling may vary depending on the assignment. The U.S.-based attorneys are closely in touch with the client to ensure that all outstanding issues are adequately addressed.

**Editor:** Does the time differential between the U.S. and India present problems?

**Patni:** On the contrary, it means that work can in fact be done 24/7. The U.S. team can perform the quality checks and follow up with the clients with respect to any outstanding issues while the Indian reviewers are sleeping. They then update the Indian reviewers and give them necessary instructions before they begin their work for the day.

**Editor:** The numbers of documents in e-discovery reviews varies widely. How does Bodhi Global cope with the fluctuations in the need for Indian reviewers under these circumstances?

**Patni:** Our services are readily scalable because we have so many highly qualified lawyers applying to us. We interview them and shortlist them in advance of any need arising. When we require additional lawyers for a particularly challenging assignment, we are able to draw upon this short-listed pool and run them through an accelerated training program. The training not only includes classroom sessions, but also real-time on-the-job experience with

a senior reviewer that enables the new resources to get up to speed faster. Also, all our reviewers have more than one area of competence, so we can shift them around depending on the work load for a particular service line.

**Editor:** What cost advantages are offered by Bodhi Global?

**Patni:** Our pricing is very competitive. We have flexible billing models. Rather than an hourly rate, we can provide a better grip on costs by charging per page, per document, or per contract – whatever works best for the client. Most importantly, we provide cost savings without compromising on the quality of the work product. Our fixed prices include all of our project management as well as Indian and U.S. quality control costs.

We try to work within a client's budget. If the client tells us how many documents they expect and their budget, we will try to work out an appropriate pricing/payment/service model. This is why it is desirable for the client to approach us as early in the process as possible.

Getting us involved early is even more important where there is an early case assessment process because we can, at that time, provide insights as to the cost of the document review. Because we have partnerships with many vendors who provide data hosting and other related services, we can come into an ECA with the right partners so that all cost centers can simultaneously provide an estimate.

**Editor:** We have focused on e-discovery. What are some of the other types of matters handled by Bodhi Global?

**Patni:** We have had great success assisting with review of documents associated with cross-border mergers or acquisitions. Again, our model lends itself well to this type of work given the high volume of data, tight deadlines, and the fact that these documents are mostly hosted on web-based platforms that provide for easy access. We are also adept at contract management – drafting and red-lining of standardized documents, analysis and abstraction of contracts under guidance of counsel, and contract database management. We do a lot of lease abstraction involving summarizing long, complicated leases in basic templates. Finally we also carry out legal research, including 50 state surveys.

**Editor:** It seems clear that you can provide a variety of useful services to a particular corporate client. In the process of doing this, your lawyers become very familiar with the client's employees, business and special needs. What are you doing to better serve such clients?

**Patni:** We provide those clients with what we call dedicated teams. These work like extensions of their own law firms or corporate legal departments. Such teams are trained to serve a particular client and bring about reciprocal knowledge building that adds value for the client as they use over time. We can craft these arrangements to suit the needs of a particular corporate law department or law firm – which includes specific recruitment and training, segregated physical and virtual work areas, and customized pricing models.

Please email the interviewee at [arihant.patni@bodhiglobal.com](mailto:arihant.patni@bodhiglobal.com) with questions about this interview.