

## WHICH COMES FIRST: LICENSING DOMINANCE OR CERTIFICATION ECOSYSTEM?

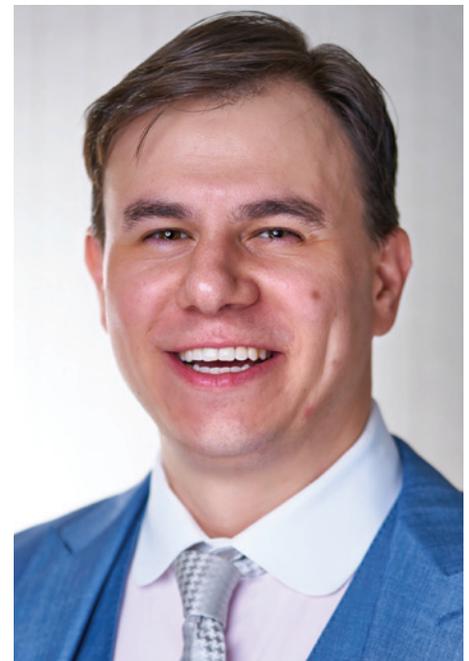
BY JARED COSEGLIA

*Looking to jump-start your legal technology career but don't know how? Jared Coseglia of TRU Staffing Partners writes a monthly column on certifications to know and training to acquire in the industry for Legaltech News. This month's piece takes a look Ipro's certification program.*

The battle for e-discovery software dominance is intensifying. According to a recent report by Valentin Pivovarov of Forbes Magazine, investment in legal technology has skyrocketed from \$233 million in 2017 to over \$1.6 billion in 2018. In January, ESI cloud software up-and-comer Disco raised an additional \$83 million in investment. Mike Gamson's recent appointment as CEO of Relativity, after hailing from LinkedIn for over a decade, also points to the industry's next evolution which will include rapid scaling of businesses, especially software

providers, in the e-discovery space. Among those who remain competitive in the software war is longtime household name, Ipro.

Ipro is a logo that has also experienced a recent capital infusion, having "received a substantial investment from technology private equity firm ParkerGale Capital" in 2017. Later that year, Ipro acquired inData Corporation, creator of TrialDirector. The intent of blending these offerings is emphasized in the closing of Ipro's online copy: "Work the way you want, from Discovery to Review to Trial Presentation." When asked how the investment has impacted the vision and tool, Krista Schmidt responds: "Moving Ipro legacy into the future, making the tool a lot simpler and breeding a good set of administrators." Krista Schmidt is the manager of professional services at Ipro Tech and has been with



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the organization for almost seven years.

"Breeding a good set of administrators" means training and certifying individuals on the tool. According to Ipro, approximately 500 people are active certified users (approx. 50 percent Ipro for enterprise and 50 percent Ipro for desktop, Eclipse SE and TrialDirector by Ipro). This does not

account for e-discovery and trial support professionals who have allowed their certification standing to lapse, many of whom are using legacy brand tools like eCapture and Eclipse which remain popular, but, Schmidt says, are being phased out. These tools are being integrated into and/or replaced by new ones that reflect the changes Ipro has undergone over the last few years. Product certifications are only valid for one year and must be renewed within that period. This might seem like a short window, but this ensures certification holders maintain product familiarity.

Sarai Schubert, Ipro's COO, states, "Ipro is focusing on finishing the full workflow from discovery to trial, deployed based on our clients' needs. Ipro continues to build a user-friendly but robust platform that can scale to work from small or large cases of varying complexity." This finishing points to the full integration and realization of Ipro's post-2017 private equity moment and TrialDirector acquisition into the enterprise offering happening now, and soon that will impact Ipro's certification program and administrator ecosystem in a meaningful way.

"Historically at Ipro we have customized our training," says Schmidt. Ipro proudly boasts robust on-premise training in its Arizona HQ and live webinar training, but also regularly deploys trainers on-site to clients licensing the technology. In addition to using its internal training resources, the process for site training also functions with what Ipro calls its T&C program, short for trainers and consultants. T&Cs are most often sole practitioners or consultants who have had deep experience with a brand tool, often since its inception. These professionals are local resources scattered throughout the world that travel to educate teams of people, classroom style.

These T&Cs do not administer the certifications, only the training. Training and certification are not bundled in the software package. "Each one is a separate line item," says Schmidt. The fee charged for the examination is \$500 per test. "When you buy the software, you buy a 'deployment package,'" adds Schmidt. Training and certification can be added on.

The pass/fail for Ipro certifications this year is a 40 percent failure average, although this number may not accurately



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reflect a well-prepared test taker's likelihood for passing. "This [statistic] is most likely affected by our Ipro Tech Show where users can take the exam for free," suggests Jim Gill, a content writer for Ipro. "This prompts users with a 'why not?' approach and often increases our failure rates in the beginning of the year. It also attests to the robust nature of the certification and the preparation needed to pass."

Schmidt gives the following advice to those seeking certification in Ipro's tools: "A person needs to be well-rounded and understand many things to pass the certifications. You can't just know review or processing." Some of the potential updates in the new software which could impact future training and certification include "a distinct focus on ease of use for the ECA and review teams, expansion on advanced security both with the Ipro enterprise platform and Ipro's cloud for hosting and an [ability to] create

almost identical parity between Ipro for desktop and Ipro for enterprise by adding case management and trial capabilities to the enterprise solutions,” says Ryan Joyce, senior VP of strategy at Ipro. “[We have also] greatly expanded our analytics offerings across our entire enterprise platform,” he adds. Ipro currently offers Ipro Cloud (ADD) Administrator Training and Certification as well as Ipro (previously ADD) Administrator Training and Certification. The cost is \$1,600 per person.

Ipro currently does not offer an online self-guided certification or training, but according to Schmidt, “Ipro is working toward e-learning now. We have an e-learning system in-house, and we are developing the remainder of the content into e-learning modules.” The eventual release of e-learning training could mark a valuable increase in Ipro’s active certification holder ecosystem. Ipro, like many software companies within and external to the e-discovery market, is primarily focused on certifying the customers that license its technology, but is this enough to breed good administrators at sufficient speed and volume to fulfill a potentially hyper-accelerated user base?

The need to breed good

administrators has been essential for any successful ESI software company to compete in the industry. As more buyers need more administrators, they will eventually go to market to acquire talent with those brand-specific skill sets. Historically, law firm litigation support departments and ESI service providers—which is where most e-discovery job openings are today—rarely rely on training from within, frequently poach talent from peer firms and almost always want superior experience with technology platforms specific to their environment. Without a pool of human resources trained on the tool, software licensees are forced to steal talent from other clients of that same licensure.

The plug-and-play technical accountability of an e-discovery professional is largely measured by the software certification status that individual achieves and maintains. The ability to voluminously train and certify users of technology that may not currently be at organizations that license that technology could be a competitive edge for business growth. Examine Relativity as an example: Relativity currently has thousands of active

of RCA (Relativity Certified Admin) certification holders. Is the availability of Relativity-certified talent-for-hire and the value and confidence those certifications give hiring managers in assessing talent for hire the reason or the result of Relativity’s rapid growth and continued client allegiance?

If talent in e-discovery needs to know a particular software in order to elevate or expand their job prospects and that training is readily available, the culture of the community indicates that professionals will seek out that training and get it. In the coming years, Ipro’s ability to scale its training and certifications programs in synchronicity with its evolving technology could contribute to customer confidence in switching streams and replacing their current software with Ipro.

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