



LITERA

Foundation

FIREMAN  
AN **epiq** COMPANY

CASE STUDY

# Winthrop & Weinstine, Centralized Experience Data with Litera Foundation

## Executive Summary

Winthrop & Weinstine, a nationally recognized full-service corporate law firm with nearly 200 attorneys, recognized the critical need for centralized experience data to remain competitive. After years of advocating for a solution, the firm implemented Litera Foundation with the support of Fireman, an Epiq Company. The pilot was a resounding success showcasing the power of Foundation to streamline data collection, improve internal storytelling, and elevate the firm's brand.

### *The Challenge*

Winthrop & Weinstine lacked a centralized system to capture and showcase their experience as leaders in affordable housing and tax credit law. Previous attempts using static tools failed due to manual entry, data inaccuracies, and a lack of data integration. The firm struggled to provide clients with compelling, data-backed insights into their expertise, especially with tight turnaround expectations.

### *The Solution*

With leadership buy-in and a clear vision, the firm partnered with Fireman to implement Litera Foundation. The real estate group was selected as the pilot due to their readiness and volume of historical data. Fireman provided strategic guidance, technical configuration, and change management support, ensuring a smooth rollout.



The team focused on integrating with the firm's financial systems to surface known data and then collect critical data points to provide a streamlined process for attorneys.

### *The Impact*

The pilot was a success. Attorneys were engaged, the data was easy to enter and search for, and the firm could finally tell its story with confidence.

*"People are saying, 'Why didn't we do this sooner?'"* said **Gretchen Milbrath, Director of Business Development and Marketing, Winthrop & Weinstine.**

The pilot team's group leader championed the initiative across the firm, sharing lessons learned and encouraging adoption. A dedicated internal resource now manages Foundation, reducing the burden on leadership and ensuring sustainability. Fireman's behind-the-scenes support and knowledge transfer empowered the firm to scale the solution across other practice groups.



LITERA

Foundation



**FIREMAN**  
AN **epiq** COMPANY

## CASE STUDY

### The Challenge

When Gretchen Milbrath, Director of Business Development and Marketing, joined Winthrop & Weinstine over a decade ago, she quickly recognized a critical gap: the firm lacked a centralized, reliable way to capture and leverage its experience data. Despite being a nationally recognized leader in affordable housing and tax credit law, the firm struggled to showcase its expertise in a scalable, data-driven way.

*"For years, we have relied on glorified Excel spreadsheets,"* Gretchen Milbrath, Director of Business Development and Marketing recalled. *"Our team built a database in Access, but it was static, manual, and prone to inaccuracies. It just wasn't sustainable."*

The consequences were clear. Attorneys couldn't easily surface deal data, marketing couldn't tell the firm's story effectively, and business development lacked the insights needed to stay competitive. *"If we don't have data, we can't compete effectively,"* Gretchen emphasized.

### The Solution

After years of advocacy, Gretchen secured buy-in from firm leadership including the president, COO, and practice group leaders to invest in a modern experience management platform. The solution? **Litera's Foundation**. Foundation was selected for its ability to integrate seamlessly with the firm's financial systems and its flexibility to scale across practice groups.

But just as important was the partnership with **Fireman**, whose team brought deep technical expertise and strategic guidance.

*"The Fireman team coming in and really helping with the configuration was invaluable. It allowed our internal teams to focus on strategy and engagement, rather than backend complexity,"* Gretchen Milbrath, Director of Business Development and Marketing, Winthrop & Weinstine.

The real estate group was chosen as the pilot group. Known for its high volume of complex deals and history of trying to manage data manually, the group was both eager and skeptical. Gretchen and the Fireman team took a thoughtful approach, starting small, focusing on just 10 critical data points, and building trust through consistent communication.

*"They gave us over an hour of their time in the kickoff,"* the Fireman team noted. *"That level of engagement was a great sign."*

### The Results

Attorneys found the system intuitive, and fast data entry took less than 30 seconds per matter. The group's leader, Jeff, became a vocal champion, sharing their success across shareholder, associate, and business professional meetings. Gretchen hired a dedicated marketing technologist to manage Litera Foundation internally to support the rollout. *"She's become the go-to expert,"* Gretchen said. *"Someone even stopped her at the coffee bar to say how easy it was to search."*



LITERA

Foundation



**FIREMAN**  
AN **epiq** COMPANY

## CASE STUDY

This internal ownership, combined with Fireman's ongoing support and knowledge transfer, created a scalable model. As new practice groups come online, they learn from the real estate team's experience of what worked, what didn't, and how to make the most of Litera Foundation.

*"Foundation is a culture change. It's not an option. This is what we have to do moving forward."*

**Gretchen Milbrath**

Director of Business Development and Marketing, Winthrop & Weinstine

The firm now has a centralized, searchable repository of experience data. Attorneys, marketing, and business development teams can collaborate more effectively, and leadership has the insights needed to make strategic decisions. Foundation has not only improved workflows but also changed the culture. What was once a fragmented, manual process is now a firm-wide initiative with clear value.

*"Foundation is a culture change. It's not an option. This is what we have to do moving forward."* Gretchen Milbrath, Director of Business Development and Marketing, Winthrop & Weinstine.

*Want to see what Foundation could do for your firm?*

[Schedule a demo](#) today.



At the forefront of the legal technology revolution, Litera provides both cutting-edge and globally trusted solutions to law firms and corporate legal teams worldwide. Our comprehensive suite of AI-driven tools powers and unifies legal workflows across Legal Work & Drafting, Knowledge Management, Legal Operations, and Security & Governance. Delivered right where lawyers work—in M365 and across devices—Litera helps legal professionals create exceptional work, win more business, streamline operations, and ensure seamless governance and data security.

For more information about Litera visit [litera.com](https://litera.com).