

Brodiess LLP Moves to Matter Centricity with WorkSite



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Industry

Law

Geographies

UK

Implementation Highlights

- Brodiess LLP has used WorkSite to adopt a matter-centric strategy in which content items of all types are managed together in a clear, intuitive structure for easy access, sharing, and better client service
- Directly through their familiar Microsoft Outlook interface attorneys at the firm have full access to WorkSite's functionality and document repositories, providing easy-to-use and integrated e-mail and document management
- WorkSite enables Brodiess to easily deploy both intranet content for remote staff access and extranet content for their clients using the same efficient document management platform

Benefits

- Intuitive matter-centric navigation, coupled with full text search capabilities, has cut the time it takes to find specific documents from as much as 30 minutes to a matter of seconds
- Because profile information can be defined at the folder level, attorneys can check content items into their workspaces quickly without having to fill out lengthy profile forms or risk mistakes resulting from manual categorization
- Matter-centric content organization has greatly simplified risk management and disaster recovery; only one folder needs to be replicated for each matter, and it is always clear when backups are necessary

"We see Interwoven's solutions as a central part of our matter-centric strategy moving forward. By adopting this next-generation content environment, we will provide our attorneys with the tools to provide responsive, accurate service to our clients and maintain effective control over the rising volume of content—particularly e-mail—that their work involves."

—Andrew Powell, IT director, Brodiess LLP

As a full-service commercial law practice, Brodiess LLP provides services to many of Scotland's best-known corporate and financial institutions as well as to a range of government departments, public authorities and private business clients. In recent years, the firm's increasing involvement in the international strategies of its clients and a large rise in cross-border work with England have driven double-digit annual growth—and placed new demands on its technological capabilities.

Prior to implementing document management (DM), Brodiess' rapid expansion had made its content harder and harder to manage. A single item could take up to 30 minutes to locate, time that came at the expense of the firm's productivity and the quality of service it could provide to clients.

After evaluating a number of potential solutions, Brodiess selected Interwoven WorkSite, which made the full range of DM functionality available through the familiar Microsoft Outlook interface in which the firm's attorneys spent most of their day.

Following a week of training and server-side setup, implementation was completed over the course of a weekend in May 2003.

"This was a very quick roll-out," recalls Andrew Powell, IT Director, Brodiess LLP.

Although the adoption of DM represented a significant cultural change for Brodiess, its users were quick to embrace the new system—especially WorkSite's intuitive navigation and robust search capabilities, which cut the time needed to find a document to 15-20 seconds at most.

Less than a year later, as its business continued to expand, Brodiess decided to take the next step. Brodiess selected Phoenix Business Solutions, an Interwoven partner, to assist with matter workspace creation and roll out. "We selected Phoenix due to their proven pedigree in the document management market. Phoenix proved to be of valuable assistance and delivered the project on time and within budget," commented Powell.

A massive increase in e-mail volume had made it necessary to manage and store these messages alongside other types of related content. The firm had also made the decision to adopt a matter-centric strategy, whereby content items of all kinds are stored by matter in a unified environment. "We want to be seen as a leading-edge firm that is easy for clients to work with," says Powell. "A matter-centric system ensures that all the information on a single matter can be found easily, giving our attorneys better control over what they are doing and helping them provide better service."

An update of the firm's network infrastructure in 2004 gave Brodiess the perfect opportunity to upgrade from WorkSite 7 to WorkSite 8, and to roll out both integrated e-mail management and a matter-centric strategy firm-wide. Content of all types, including documents, memoranda, e-mails, scanned images, PDFs, faxes and graphics files, are now stored by matter in unified workspaces—as before, the entire system is accessible via the standard Outlook interface.

The server side upgrade was completed in advance over a weekend while the client software was built into a new PC image and rolled out over a single weekend at the same time as Exchange 2003 and Active Directory.

Fast, accurate e-mail and document management

With WorkSite 8 in place, Brodies' matter-centric strategy has been a complete success. "One of the main benefits of this system has been speed," Powell says simply. As each new client or matter is opened, an automatic feed from the firm's financial system makes a new workspace available for attorneys and staff to use when they begin their work. These workspaces can be navigated easily by client, matter, industry, employee and other criteria; says Powell, "The matter list is logical and saves time, and makes it so much easier for people to find documents." In the rare event that a user can't find a document right away, robust search capabilities can be relied on to locate it in a matter of seconds.

Users also save time when saving documents into the repository. Each workspace is pre-populated with profile information that is automatically assigned to each content item inside, eliminating the need to fill out lengthy forms and the categorization errors that can result from manual entry. The same applies for non-transactional documents such as HR documents and policies, which are stored in workspaces of their own within the same intuitive structure.

Anytime, anywhere information With complete matter information at their fingertips, Brodies' attorneys have achieved greater responsiveness and a higher quality of work for their clients. Client service has been further enhanced by self-service extranet sites, generated with WorkSite, that permit clients to directly access their own workspaces as needed rather than having to request updates by e-mail or phone. Similarly, intranet sites provide content for use by employees working at a client site, in court or at other remote locations. A high level of

granularity provides IT with the access control and security needed to maintain effective control over the firm's content without impeding its productive use. Meanwhile, helpdesk calls have dropped dramatically, freeing technical personnel for higher-value work.

The unified, matter-centric content environment supported by WorkSite has delivered benefits beyond the daily work of Brodies' attorneys. With documents of all types managed together, the document lifecycle is simplified enormously, and the firm can clearly identify everything related to a given matter and ensure the consistent application of archiving, retention and destruction policies. Backup and disaster recovery are also greatly simplified for further risk management. The firm is currently working on a strategy under which workspaces are profiled with opened and closed dates and then archived automatically. This will make the live document repository more manageable, which in turn simplifies backup and disaster recovery.

Having helped Brodies evolve from a DM newcomer to a legal technology leader in only two years, Interwoven remains a central part of the firm's ongoing content strategy. With 150 attorneys and 270 total users—and more than 1.5 million documents in its WorkSite repository—the firm isn't finished growing yet. Matter-centricity with WorkSite 8 will provide the foundation for fast, efficient performance and outstanding client service no matter how large Brodies becomes.

Technology

Solution Summary:

Interwoven WorkSite 8 collaborative document management software enables Brodies LLP to manage content items of all types, including e-mails, in a single matter-centric environment that makes information easy to navigate, search and access. The firm also uses WorkSite to deploy content to employee intranets and client extranets

Interwoven, Inc.
803 11th Avenue
Sunnyvale, CA 94089 USA
(408) 774-2000

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