

## LEGAL INDUSTRY DOCUMENT MANAGEMENT CASE STUDY

### Creating vision within a solution

#### Client Profile:

*A top international Law Firm based in the UK, offering a broad range of legal services to major corporate, government, institutional and private sectors clients nationally and internationally.*

#### Driver:

*To update the existing document management system in order to make the process more effective and efficient whilst moving toward web-based technology. To move away from its existing individual pockets of document knowledge to a consolidated document based knowledge repository.*

#### Challenges:

- *Transform the desk-top based processes to web-based processes*
- *Consolidate various document repositories into a common repository therefore facilitating the exchange of documents and knowledge between departments and offices*
- *Ensuring migration process would not impact users daily activities*

***“The web-based system has helped us with our strategy for on-line solutions...and will become the cornerstone for our online offerings.”***

With an existing document management system already in place, the first phase was to identify the working practices and determine the pain factors within the existing solution. It had been some time since the initial introduction of DMS and it was felt that the requirements of the business had subsequently changed. Additionally, the processes of new practice areas needed to be reviewed in order to accommodate the business strategy of the firm.

A series of user workshops (attended by partners, secretaries and PSL's) was carried out, focusing on the major practices of the firm as well as other business areas such as HR, Finance, Training and Marketing. Additionally, a vigorous and in-depth Health Check was carried out to determine the potential and limitations of the existing infrastructure, addressing issues such as networks, security, hardware and software applications

#### Solutions:

The main objective was to enable users on the existing system and those on the new system to co-work in the same environment and on the same documents - until such time that the whole user base was brought together on the same platform. Fortunately, the existing DMS vendor's n-tier architecture was able to meet this requirement as well as other functional requirements that had been defined by the firm.

The initial objective was to consolidate all the existing document libraries into a common document repository. However, concern over backup and response time meant it would be more efficient to create a virtual common library whilst leaving the existing libraries as they were. This ensured that daily working practices for end-users were not compromised.

The ensuing workshops highlighted the fact that even though the web-based solution would be more effective than the current solution and would be in-line with the firms overall strategy, the Microsoft Outlook and Office integrations would become the common working practice of the daily user. This was further clarified in the pilot that was carried out, the result of which contributed towards the modification of process and working practices. Training had to subsequently be reviewed to incorporate these changes.

Upon successful completion of the pilot review, Marketing and Litigation practices were selected as the first recipients of the solution - as a result they became the internal promoters of the new solution. The migration process for both technology and processes took 3 months in total.