

Lenczner Slaght Manages E-mail the Matter-Centric Way with Interwoven


 LENCZNER SLAGHT

One of Canada's premier litigation and advocacy practices. The firm has a strong commitment to core values of courtroom excellence and client service

Industry

Law Firm

Geography

North America

Implementation Highlights

- Matter centric folders gives staff a quick way to find matter content throughout the firm
- Integrated e-mail management enables the filing and access of e-mails stored alongside all other client information
- Integration with the accounting system automates workspace creation and enables matter work to start immediately

Benefits

- Attorneys and Staff can now easily access all matter related e-mails and share with team members throughout the firm
- Robust search capabilities provide the quick location of institutional knowledge for refining litigation strategy and facilitating re-use of past work product
- Adoption of matter-centric collaboration has increased productivity and reinforces the firm's reputation as a leader in the use of state-of-the-art technologies



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—Gerry Tipold, firm administrator, Lenczner Slaght Royce Smith Griffin LLP

Founded in 1992, Toronto-based Lenczner Slaght Royce Smith Griffin LLP is widely acknowledged as one of Canada's premier litigation and advocacy practices. The firm has built its strong reputation through a commitment to core values of courtroom excellence and client service, as well as its responsiveness to new trends in legal technology such as e-discovery. "We very much see ourselves as a technology leader; it's something we embrace and welcome," says Firm Administrator Gerry Tipold.

Recently, Lenczner Slaght's technological acumen was pressed into service to solve a problem facing many of today's law firms. Since its inception, the firm had used a folder system to manage its electronic documents based on client code and matter number. With the number of documents in the system approaching half a million, it was becoming harder and harder for attorneys and staff to find what they were looking for, especially when standard filing protocols weren't followed. "Without better search capabilities, we spent a fair amount of time hunting for things, especially after hours when assistants weren't necessarily around to help," recalls Tipold.

The increasing role of e-mail in the firm's communications compounded the challenge. Stored on a separate Microsoft Exchange server, these messages and the vital matter content they contained remained separate from other document types, and largely inaccessible to anyone but the original

author or recipient. As the firm continued to add personnel and grow its business, the search for a better solution for document and e-mail management became a top priority.

Expert implementation for a best-in-class solution

From the start, Lenczner Slaght had a clear vision for their ideal DM solution. Robust search and e-mail management capabilities would help attorneys and staff locate matter content quickly and reliably. Version control would eliminate the multiple saved versions that had been cluttering the server. The system would also be easy to use, without adding work for staff members in terms of opening, saving, and profiling documents.

Preferring to work with a major, proven vendor, Lenczner Slaght quickly narrowed its list to two contenders. One, Interwoven WorkSite, represented the state of the art in legal technology, including both fully integrated e-mail management and a matter-centric organizational model that is already reshaping content practices throughout the industry. "Interwoven WorkSite seemed to be a tighter, more seamlessly integrated solution," reports Glenn Smith, a partner with Lenczner Slaght. "The other solution seemed patchier, as if they had tried to add e-mail management as an afterthought."

Having chosen the best solution for its needs, Lenczner Slaght found the right implementation partner just down the road in RBRO Solutions of Pickering, Ontario. "We spoke with other law firms and heard nothing but positive things about them," says Tipold. As a key Interwoven partner, RBRO brought to the project its own set of best practices and tools around matter-centric collaboration. "We enjoyed working with them; they were very knowledgeable and helpful, and they really know how law firms operate"

Following a successful pilot implementation, RBRO helped Lenczner Slaght convert its entire document repository over to WorkSite. Training was equally painless; "I must say, people really embraced the technology—they picked it up and ran with it. There wasn't a lot of stumbling around, and not much resistance to change," says Tipold.

Matter-centric e-mail management wins new converts

The Interwoven solution went live for Lenczner Slaght's 75 users in February 2006. Integration with the firm's accounting system has automated the new client opening process, generating a new workspace based on a matter-centric template so that attorneys and staff can begin work immediately.

Interwoven's matter-centric collaboration (MCC) model proved highly intuitive and easy to adopt for the firm's users. By consolidating every type of content within a single, universally accessible electronic file, MCC enables law firms for the first time to manage client or matter-related content in the electronic world the way they have done for more than 100 years in the physical world. Fully integrated e-mail management extends the benefits of MCC to encompass the matter content they contain as well. For both e-mails and other types of documents, profile information is assigned automatically based on the folder in which they are filed, greatly simplifying the classification process for users while improving its accuracy.

Previously, staff members had to create client folders in Outlook, drill down further to create matter folders, then remember to file e-mails in them correctly. Typically, only assistants could see these folders, not the attorneys themselves, and they contained only that individual's own e-mail correspondence.

With WorkSite, attorneys, assistants, and anyone else in the firm can access full matter content quickly and reliably in a single location, including e-mails as well as other types of documents. Integration with Outlook makes the full range of document and e-mail management functionality accessible through the same familiar application in which the firm's attorneys already spend most of their time.

E-mail management has also eased the burden on Lenczner Slaght's Exchange server, By offloading e-mails into the WorkSite repository, the firm has eliminated the need to invest in additional hardware capacity or offsite archiving.

Strategic advantage for today—new initiatives for tomorrow

"We view Interwoven as very much a strategic investment," says Tipold. "It's a competitive advantage to be able to provide attorneys with tools like these. When clients want to know what kind of technology we use, we tell them we're working with the top products out there, this is how it's making our life easier, and this is how it helps us work effectively with our clients."

One key benefit has been the facilitation of knowledge sharing among the firm's professionals. Users can search for all clients with a particular common item in their lawsuit—for example, "environmental contamination"—and research the relevant documents to refine the strategy for the current case. Past work product can also be easily re-purposed, eliminating the need to start from scratch each time and freeing attorneys for more high-value work.

Moving forward, Lenczner Slaght plans to leverage its Interwoven investment to expand its deployment of client-specific extranets as well as enhancing its own intranet. Interwoven RecordsManager is part of the firm's future plans, extending its matter-centric implementation to encompass comprehensive, fully integrated records management. "That's one of the great benefits of the Interwoven solution; it positions us well for things like that," says Tipold. "We've never had a second thought about choosing Interwoven over the alternatives. We're convinced that this is the better product, and we're glad we made the right decision."

Technology

Solution Summary:

Interwoven WorkSite 8 Server software integrated document management, e-mail management, and collaboration, organized on a matter-centric model, for Lenczner Slaght's attorneys.

Interwoven FileSite provides tight desktop integration of WorkSite with the Microsoft Outlook and Office applications used by attorneys and their staff, enabling them to drag-and-drop e-mails and documents directly into matter-centric WorkSite workspaces.

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

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